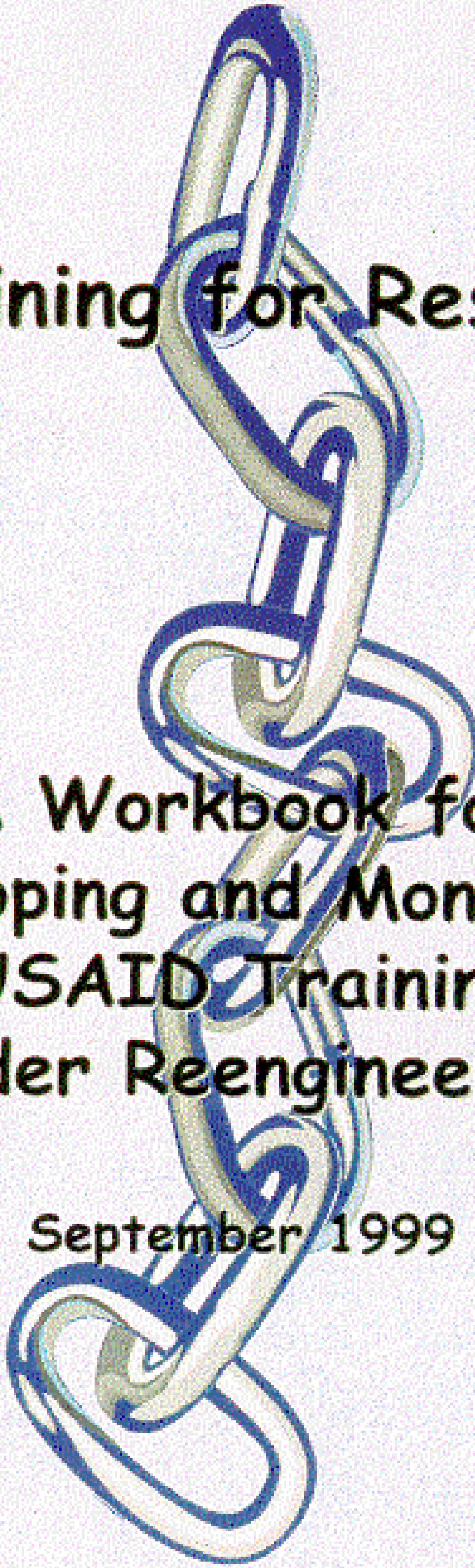

Training for Results

A Workbook for Developing and Monitoring USAID Training Under Reengineering

September 1999

Developed by USAID/E&E Bureau

Training for Results

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E&E/EEUD (E&E Training Office)
U.S. Agency for International Development
Washington, DC 20523

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Acronym List

- ⌘ ADS—Automated Directives System
- ⌘ AED—Academy for Educational Development
- ⌘ CA—Cooperative Agreement
- ⌘ CAR—Central Asian Republic
- ⌘ CEE—Central and Eastern Europe
- ⌘ E&E—Europe and Eurasia
- ⌘ EEUD—Energy, Environment, and Urban Development
- ⌘ ELC—Experiential Learning Cycle
- ⌘ Extended SO Team—extended strategic objective team (includes USAID staff, training contractors, and technical assistance providers)
- ⌘ G/HCD—Global Bureau (USAID)/ Center for Human Capacity Development
- ⌘ HCD—Human Capacity Development
- ⌘ IR—Intermediate Result
- ⌘ ISTI—International Science and Technology Institute, Inc..
- ⌘ KSA—Knowledge, Skills, and Attitudes
- ⌘ M&E—Monitoring and Evaluation
- ⌘ MPP—Mission Performance Plan
- ⌘ NA—Needs Assessment
- ⌘ NIS—New Independent States
- ⌘ OJT—On-the-Job Training
- ⌘ PI—Performance Indicator
- ⌘ PMP—Performance Monitoring Plan
- ⌘ PMP-T—Performance Monitoring Plan for Training
- ⌘ PO—Partner Organization
- ⌘ RF—Results Framework
- ⌘ R4—Results Review and Resource Request
- ⌘ RFP—Request for Proposal
- ⌘ RFTP—Request for Training Proposal
- ⌘ RP—Results Package
- ⌘ SAA—Strategic Assistance Areas
- ⌘ SO—Strategic Objective
- ⌘ SO Team—Strategic Objective Team
- ⌘ SP—Strategic Plan
- ⌘ TA—Technical Assistance
- ⌘ TEOL—Training Events On-Line
- ⌘ TERF—Training Event Request Form
- ⌘ TRANSIT—Technical Training for Societies in Transition
- ⌘ TRC—Training-for-Results Chain
- ⌘ TRG—Training Resources Group, Inc.
- ⌘ USAID—United States Agency for International Development
- ⌘ WG—Work Group
- ⌘ WL—World Learning, Inc.

Chapter 1: Introduction

Objectives of the TRC Workbook

Overview of the TRC Workbook

Objectives of the TRC Workbook

⌘ The **Training-for-Results Chain (TRC)** Workbook was created to

- clarify how training events and training plans contribute to achieving a Mission's strategic plan;
- define the links of the Training-for-Results Chain and explain the step-by-step process for using the chain to plan training events; and
- provide a reference for using the Training-for-Results Chain in completing the Training Event Request Form on the Training Events On-Line (TEOL).
    - The TEOL is a database found on the Training Assistance for Central and Eastern Europe (CEE) and the New Independent States (NIS) website located at http://www.enitraining.net.

⌘ The TRC workbook provides a suggested process and framework to design, implement, monitor, and evaluate training events that support the achievement of Mission, Regional, and Agency strategic objectives and results.

⌘ The workbook is a tool to be used by Mission program officers and extended Strategic Objectives (SO) teams, including partners, contractors, grantees, and Cooperative Agreements (CAs) when planning targeted training events that will support the achievement of the Mission's strategic plan.

Overview of the TRC Workbook

- The TRC workbook is divided into five chapters. Chapter 1 provides a brief introduction to the objectives, uses, and design of the workbook.

- Chapter 2 provides a brief review of USAID's Mission, Core Values, Goals, E&E's Strategic Assistance Areas, and Strategic Plans and Results Frameworks.

- Chapter 3 explains the linkage between training and USAID's Results Frameworks.

- Chapters 4 and 5 are divided into subchapters. Each subchapter describes a link in the TRC and includes exercises and "how-to" hints to apply each link when designing and monitoring a training event.

- The exercises have been designed to help you apply the TRC as you plan and monitor training events. They also link directly to several sections of the Training Event Request Form on the Training Events On-Line (TEOL) website. The Training Event Request Form is a computer-assisted format that lets you plan and submit proposed training events for approval and funding.

- A glossary can be found at the end of the workbook. Following the glossary is a series of annexes. The annexes include a table showing a comparison of traditional and reengineered training, some sample monitoring instruments, and TraiNet questions. Bibliographic information and a list of Internet-related websites follow the annexes.

- The included diskette contains the exercises and performance monitoring plan for training forms. The CD-ROM contains the entire TRC workbook.

The TRC workbook is color-coded.

- **Background Information (chapters 1-3) is printed on white paper.**
- **The Planning Phase of the TRC (chapter 4) is printed on pink paper.**
- **The Monitoring Phase of the TRC (chapter 5) is printed on green paper.**
- **Exercises are printed on yellow paper.**
- **The Performance Monitoring Plan for Training forms are printed on blue paper.**

Chapter 2: Background

Introduction

USAID's Mission Statement and Core Values

USAID's Agency-Wide Goals

E&E's Strategic Assistance Areas and Strategic Objectives

USAID's Strategic Plan and Results Frameworks

R4s and Mission Performance Plans

Introduction

⌘ Chapter 2 highlights USAID planning and monitoring procedures under reengineering. The procedures form the basis for the design and evaluation of all USAID programs and activities, including training interventions.

⌘ The chapter includes definitions and descriptions of the following:

- Agency Mission Statement;
- Core Values;
- Agency Goals;
- E&E's Strategic Assistance Areas; and
- Strategic Plans and Results Frameworks.

⌘ The mission statement, core values, goals, strategic assistance areas, and strategic plans and results frameworks are important concepts to keep in mind when you design training events.

USAID's Mission Statement and Core Values

USAID's Mission is to
Contribute to U.S. national interests by supporting the people of developing and transitional countries in their efforts to achieve enduring economic and social progress and to participate more fully in resolving the problems of their countries and the world.

USAID has identified five interrelated **Core Values** that help define what the agency stands for. The core values include the following:

⌘ Teamwork and Participation

- USAID forms Strategic Objective Teams committed to the achievement of customer-focused results for which team members hold themselves individually and collectively accountable.

⌘ Customer Focus

- USAID, more consistently and systematically, involves both partners and customers in strategic planning and performance measurement.

⌘ Managing for Results

- USAID manages for results through a customer-driven, results-oriented strategic planning and performance measurement approach. This means setting clear objectives and targets, collecting adequate information to measure progress, and adjusting strategies and tactics as required, all in consultation with customers.

⌘ Empowerment and Accountability

- USAID invests its Strategic Objective Teams with authority to make and implement decisions that will produce results, with accountability for such decisions resting with the teams.

⌘ Diversity

- USAID is creating an environment where every employee is valued and accepted, where management practices are inclusive rather than exclusive, and where differences are not only accepted but used to strengthen Agency performance.

USAID's Agency-Wide Goals

USAID has adopted seven Agency-Wide Goals.
Each goal represents a long-term development result that the Agency is working to achieve.

⌘ Goal 1: Broad-based Economic Growth and Agriculture Development Encouraged

- USAID promotes Goal 1 through programs that
  - expand and strengthen critical private markets;
  - encourage more rapid and enhanced agricultural development and food security; and
  - expand and make more equitable access to economic opportunities for the rural and urban poor.

⌘ Goal 2: Democracy and Good Governance Strengthened

- USAID works toward Goal 2 by emphasizing
  - strengthened rule of law and respect for human rights;
  - more genuine and competitive political processes;
  - increased development of politically active civil society; and
  - more transparent and accountable government institutions.

⌘ Goal 3: Human Capacity Built through Education and Training

- Under Goal 3, USAID works to achieve Goal 3 through
  - expanded access to quality basic education for underserved populations, especially for girls and women; and
  - increased contributions of host-country institutions of higher education to sustainable development.

⌘ Goal 4: World Population Stabilized and Human Health Protected

- USAID focuses on Goal 4 through its commitment to
  - sustainable reductions in unintended pregnancies;
  - sustainable reductions in child mortality;
  - sustainable reductions in maternal mortality; and
  - sustainable reductions in sexually transmitted infections (STI) / HIV transmission among key populations.

- **Goal 5: The World's Environment Protected for Long-Term Sustainability**
  - Under Goal 5, USAID works closely with its development partners worldwide to
    - reduce threats to global climate change;
    - conserve biological diversity;
    - promote improved urbanization and better pollution management;
    - increase the provision of environmentally sound energy services; and
    - promote sustainable natural resource management.

- **Goal 6: Lives Saved, Suffering Reduced, and Conditions for Political and Economic Development Reestablished**
  - To achieve the goal of humanitarian assistance, USAID's strategic framework includes prevention, relief, and transition objectives as follows:
    - prevention—reducing the potential impact of humanitarian crises;
    - relief—meeting urgent needs in a crisis situation; and
    - transition—establishing security and restoring the function of basic institutions to meet critical needs and basic rights.

- **Goal 7: USAID Remains a Premier Development Agency**
  - Under Goal 7, USAID strives for
    - enhanced leadership to achieve development results; and
    - enhanced management capacity to achieve results and deliver assistance resources.

E&E Strategic Assistance Areas and Strategic Objectives

The E&E Bureau has identified four **Strategic Assistance Areas** (SAAs) that are important for the transition of E&E countries to market-oriented, democratic societies.

The SAAs provide a common point of reference for E&E Missions and make explicit the E&E Bureau's strategic priorities**.**

E&E's **Strategic Objectives** are derived from the SAAs.

⌘ SAA 1: Economic Restructuring

Goal: To foster emergence of a competitive, market economy in which the majority of economic resources are privately owned and managed

- SO 1.1: Increased transfer of state-owned assets to the private sector.
- SO 1.2: Increased soundness of fiscal policies and fiscal management practices.
- SO 1.3: Accelerated development and growth of private enterprises.
- SO 1.4: A more competitive and market-responsive private financial sector.
- SO 1.5: A more economically sound and environmentally sustainable energy system.
- SO 1.6: Increased environmental management capacity to support sustainable economic growth.

⌘ SAA 2: Democratic Transition

Goal: To support the transition to transparent and accountable governance and the empowerment of citizens through democratic political processes

- SO 2.1: Increased, better-informed citizens' participation in political and economic decision making.
- SO 2.2: Legal systems that better support democratic processes and market reforms.
- SO 2.3: More effective, responsive, and accountable local government.

⌘ SAA 3: Social Sector Reform

Goal: To reform health and human services to address the needs of societies in transition to market-based democracies

- SO 3.1: Improved response to and management of humanitarian crises.
- SO 3.2: Improved sustainability of health and social benefits and services.

⌘ SAA 4: Special Initiatives and Cross-Cutting Programs

- SO 4.1: Special initiatives are activities that do not contribute to a strategic objective in the country program but may relate to a special directive or earmark or address an extraordinary circumstance that requires USAID assistance.

- SO 4.2: Cross-cutting programs are strategic in nature but make significant contributions to two or more strategic objectives. The most common example is participant training, which is normally presented under this SAA to simplify grant management and accounting.

USAID Strategic Plans and Results Frameworks

- Under reengineering, USAID/W requires each Mission to develop and submit the following two planning and reporting documents:
  - a Strategic Plan; and
  - a Results Review and Resource Request (R4).

- A **Strategic Plan** (SP) is the framework that a Mission uses to articulate priorities, manage for desired results, and tie the results to the customer.

- A **Results Framework** (RF) is a narrative and graphic depiction of the strategic plan. The RF articulates strategic objectives, supporting intermediate results, and performance indicators. The RF establishes a basis for the Mission to measure, analyze, and report results and to describe how the accomplishment of intermediate results will lead to the achievement of a given strategic objective.

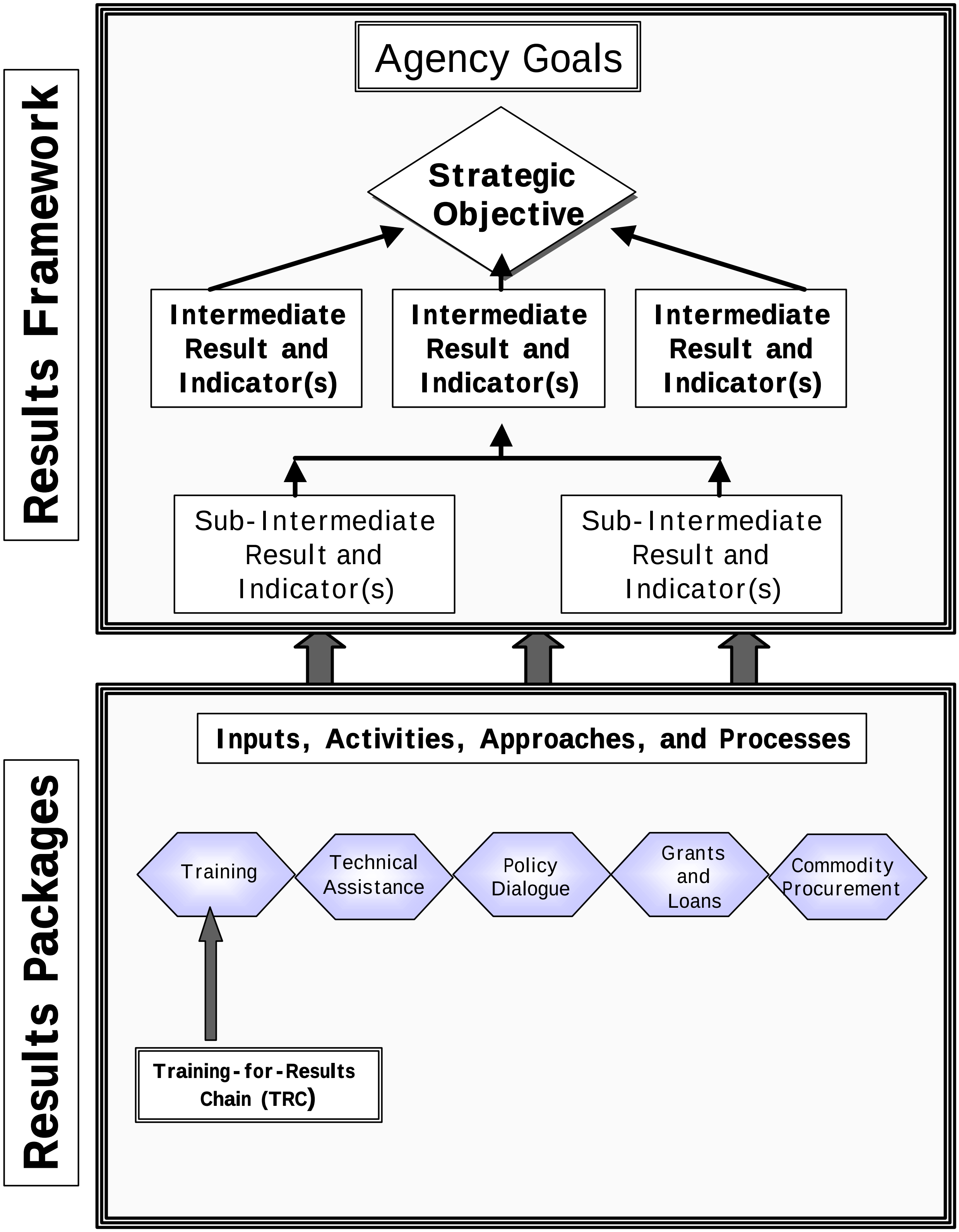
  - A **Strategic Objective**(SO) describes a significant development result that is clear, precise, and objectively measurable. It is the highest-level result that the Mission can materially affect and for which it is willing to be held accountable. It is linked to Agency objectives and goals and should be achievable within five to eight years.

  - An **Intermediate Result** (IR) is a critical outcome that must occur in order to achieve a strategic objective. Linkages between IRs and SOs are causal, meaning that the IR must support the achievement of the SO. IRs must also be measurable and quantifiably verifiable.

  - A **Performance Indicator** (PI) is a particular characteristic or dimension that can be used to measure intended changes. PIs answer “how” or “whether” progress is being made toward achieving the objective or result. PIs are expressed in quantifiable, measurable, and objective terms. Missions develop a **Performance Monitoring Plan** (PMP) to collect data on indicators in order to monitor performance. Baseline data and targets are included in the PMP.

- A **Results Package** (RP) defines the specific training, technical assistance, resources, policy dialogue, commodity procurement, and other inputs that will be required to support the accomplishment of the Intermediate Results and Strategic Objective.

The following diagram illustrates the relationship between an RF and an RP.


Results Framework
Agency Goals
Strategic Objective
Intermediate Result and Indicator(s)
Intermediate Result and Indicator(s)
Intermediate Result and Indicator(s)
Sub-Intermediate Result and Indicator(s)
Sub-Intermediate Result and Indicator(s)
Results Packages
Inputs, Activities, Approaches, and Processes
Training
Technical Assistance
Policy Dialogue
Grants and Loans
Commodity Procurement
Training-for-Results Chain (TRC)

R4s and Mission Performance Plans

⌘ The **R4** (Results Review and Resource Request) is the only formal performance reporting document that USAID/W requires Missions to produce.

- The R4 process ensures that results are linked to resource decisions.
- The R4 document highlights the Mission's progress in achieving SOs and estimates the amount and type of resources required to carry out the Mission's approved strategy and to achieve planned results.

⌘ USAID and the U.S. Department of State coordinate closely to ensure that the R4 is consistent with the **Mission Performance Plan** (MPP). The MPP is the authoritative, integrated, interagency country strategy document that is prepared by the country team (including USAID staff) and approved by the chief of Mission (usually the ambassador). In addition to defining goals and planned performance of all the U.S. government agencies working in a country, the MPP reports on past performance and requests resources. MPP goals are based on national interests and strategic goals.

⌘ The Mission's strategic plan and R4 complement the MPP by providing a detailed description and analysis of USAID-managed objectives and related performance as well as budget planning information.

Chapter 3: Relationship of Training to Results Frameworks

Training's Role in Results Frameworks

Comparison of Traditional Training with Reengineered Training—Key Points

Linking the Training-for-Results Chain to Training Events On-Line

Training's Role in Results Frameworks

- Chapter 3 highlights the importance of integrating training into the Mission's strategic planning process. The chapter includes the following:
  - a working definition of training; and
  - a brief comparison of traditional training with reengineered training.

- Each year, USAID invests several hundred million dollars in a wide range of training interventions, some of which are directly linked to Mission SOs and IRs and some of which could be better integrated into a Mission's strategic plan. If designed appropriately, training can play an important role in supporting the achievement of a Mission's SOs and IRs.

- Using the **Training-for-Results Chain** (TRC) described in this workbook will ensure that training interventions directly support the achievement of the Mission's strategic plan.

- Training can be defined as a structured experience that helps individuals acquire new, predetermined knowledge, skills, and behaviors. These experiences help individuals improve their current job performance and/or prepare them for new job responsibilities that support an overall organizational goal.

- Embedded in this definition is the concept that training does not have an impact until the skills or knowledge acquired by the trainees have been successfully applied to a specific work situation, which, in turn, results in a measurable improvement in performance. Successful training is not measured in terms of numbers of individuals trained but rather by the contribution made by trainees to individual and organizational performance improvement.

Comparison of Traditional Training and Reengineered Training—Key Points

⌘ The evolution from traditional training to reengineered training brings with it a variety of new methods and processes, as well as the need for a new mindset by all Mission staff, training contractors and Technical Assistance (TA) providers who design and implement in-country, third-country and U.S.-based training events.

⌘ Among the several major differences between traditional training and reengineered training are the following:

⅄	Traditional	Training was the objective.
⅄	Reengineered	Training objectives must show direct linkage to SOs or IRs.
⅄	Traditional	Training designs were based on the needs of trainees.
⅄	Reengineered	Training designs are targeted and based on the need to upgrade the performance of the organization / institution.
⅄	Traditional	The number of people trained was the indicator for evaluation.
⅄	Reengineered	Baseline data and targets are required. Data are used to measure improvement in performance and results.
⅄	Traditional	Accountability rested with trainers only.
⅄	Reengineered	Trainees, supervisors and trainers are accountable for achieving training objectives and results.
⅄	Traditional	Training was the sole responsibility of the Mission's training office.
⅄	Reengineered	USAID staff, training contractors, TA providers involved in training, partner organizations, work groups, and trainees are all partners in the training process.

See Annex 1 for a more complete comparison of traditional and reengineered training.

⌘ Reengineered training is implemented by USAID staff, training contractors, and TA providers who:

- target specific SOs and IRs;
- identify performance problems within a partner organization / work group;
- determine the knowledge and skills that employees need for addressing performance problems;
- identify trainees who will be able to perform jobs that improve the organization's performance;
- develop specific, clear, measurable training objectives;
- design training events that link directly to the identified performance needs; and
- conduct interviews and evaluations, both during and following training, to track results, document changes in individual performance, and monitor any organizational performance changes that will support the achievement of targeted SOs and IRs.

⌘ A **Training Event** is a structured intervention or series of interventions that leads to enhanced ability to perform a job.

- Examples of training events include the following:
  - training courses;
  - workshops;
  - seminars;
  - conferences;
  - observational study tours; and
  - on-the-job training.

- Training events may be implemented in-country, in a third country, or in the U.S.

⌘ A **Mission Training Plan** is a comprehensive catalogue of all training events that are designed to support the achievement of the Mission's SOs and IRs. Training plans are prioritized and submitted by members of the extended SO teams (USAID staff, training contractors, and technical assistance providers) to Mission senior staff for approval and funding. Training plans are also reviewed by the E&E Bureau in Washington.

Refer to the Glossary for additional definitions.

Linking the Training-for-Results Chain to Training Events On-Line

⌘ The **Training-for-Results Chain** (TRC) described in this workbook links directly to an interactive Web page that allows E&E staff and contractors to plan training events online.

⌘ The **Training Events On-Line** (TEOL) database can be found on the Training Assistance for Central and Eastern Europe and the New Independent States website located at http://www.enitraining.net

⌘ The TEOL database includes an interactive form for designing training events for the E&E region. The form is the **Training Event Request Form**.

⌘ Following the steps and completing the exercises in the TRC workbook will enable members of extended SO teams to complete Sections A, B, and C of the Training Event Request Form more effectively.

⌘ To access the E&E website and use the Training Event Request Form on the TEOL, you need a user name and password, which may be obtained from either the person in the Mission responsible for training or the E&E/EEUD contact in Washington, Jim Nindel (jnindel@usaid.gov).

⌘ There are five access levels as follows for the TEOL and the Training Event Request Form:

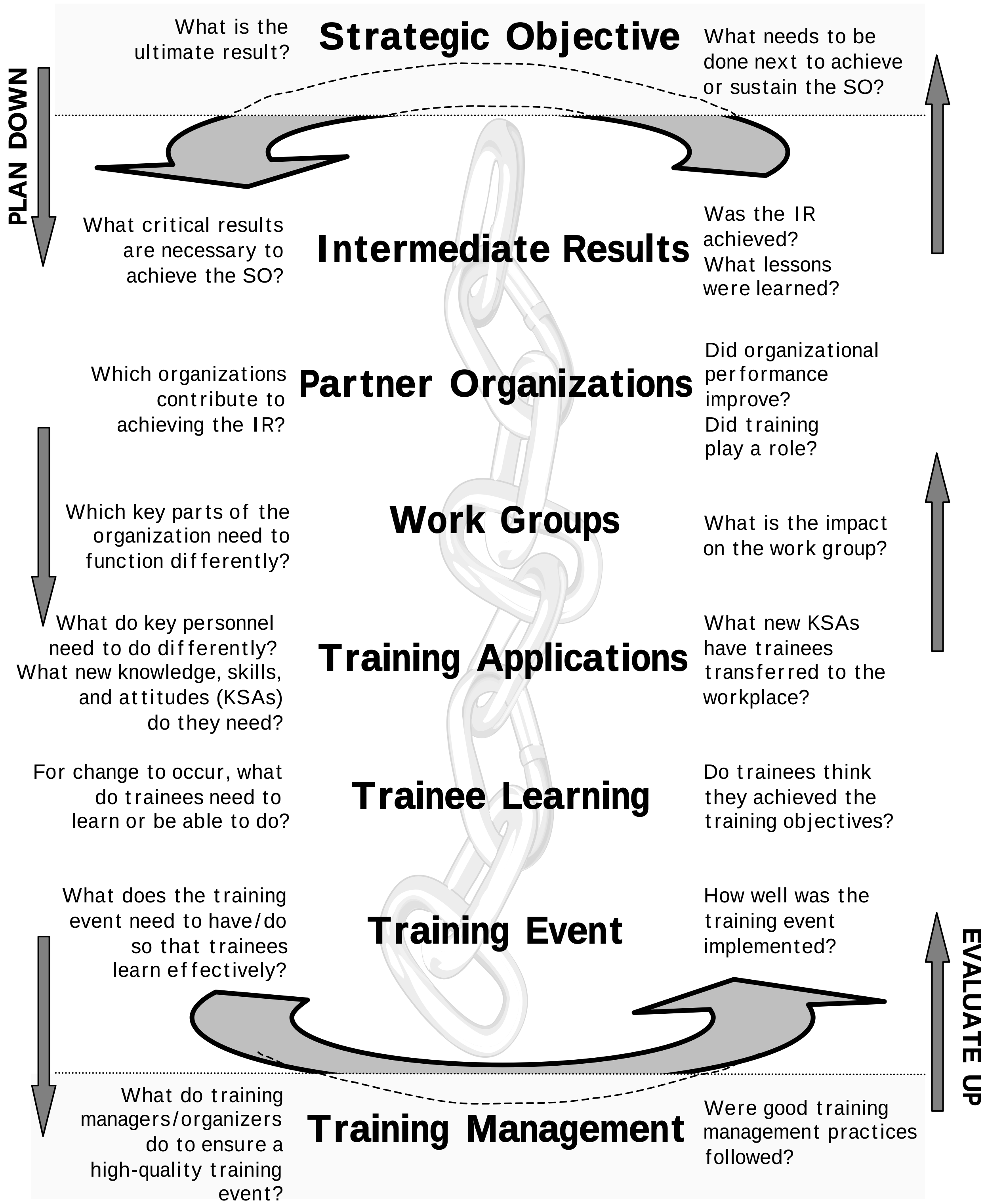
- Level 1: Read only (no user name or password required).
- Level 2: Develop, edit, read training events (users are project officers / TA providers).
- Level 3: Develop, edit, read; change status from under development to proposed (users are SO team leaders, office directors, training contractors, E&E/EEUD staff).
- Level 4: Develop, edit, read Mission training events; finalize approved Mission training plan; read approved training plans from other E&E Missions (users are training officers, designated regional and USAID/W senior managers, training contractors).
- Level 5: Contains prioritized training events for the Mission and information on funding amounts, other relevant data (users are Mission Director and other senior management).

The following chapter describes how to use the TRC to plan training events. It includes a series of exercises that will prepare you to complete Sections A, B, and C of the Training Event Request Form.

Chapter 4: The Training-for-Results Chain—Planning Phase

USAID/E&E

Training-for-Results Chain



http://www.enitraining.net
http://www.info.usaid.gov/regions/eni

Introduction to the Training-for-Results Chain

⌘ The **Training-for-Results Chain** (TRC) illustrated on the previous page is a tool developed for USAID staff, training contractors, and TA providers to assist in both the design of individual training events and compilation of a Mission-wide training plan that directly supports the achievement of a Mission's strategic objectives.

⌘ The TRC helps extended SO teams work together to compile information from the Mission's Results Framework, R4, previous training plans, and other relevant documents to design training events that support the achievement of the Mission's SOs. The information gathered during the planning stage is used to complete the Training Event Request Form on the Training Events On-Line (TEOL) website.

⌘ During the monitoring and evaluation stage, the TRC is used to gather data from various sources, including the following:

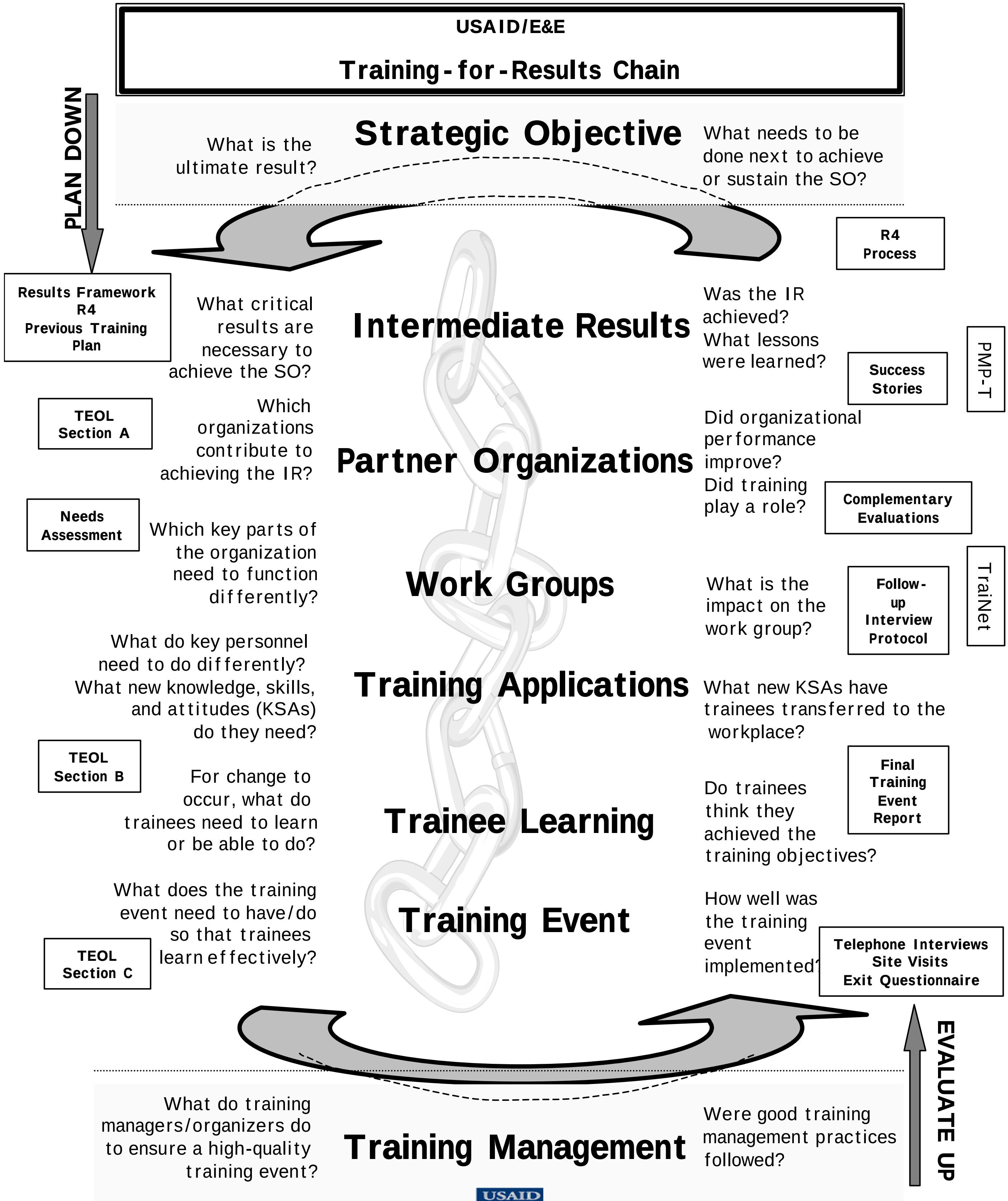
- stakeholder agreements;
- action plans;
- results of training site visits, exit questionnaires, and telephone interviews;
- final training event reports;
- targeted follow-up questionnaires;
- targeted follow-up interviews;
- success stories; and
- complementary evaluations, if available.

⌘ The monitoring and evaluation data provide input for the following three monitoring documents:

- TraiNet, a tracking database used by the USAID Global Bureau to compile and report information on USAID-funded training;
- The Performance Monitoring Plan for Training (PMP-T); and
- The R4, the mechanism used by USAID to review results and request resources.

The TRC contains eight interconnected and sequential links. The following page illustrates how the TRC is used:

- from the top to the bottom on the left-hand side to *PLAN* training events; and
- from the bottom to the top on the right-hand side to *MONITOR* and *EVALUATE* training events.



http://www.enitraining.net
http://www.info.usaid.gov/regions/eni

Using the TRC to *Plan*

⌘ Strategic Objective (SO) teams discuss how a specific **Strategic Objective** can be effectively supported by training.

⌘ SO teams clarify which of the Strategic Objective's **Intermediate Results** can be supported by one or a series of training events.

⌘ The extended SO team (including USAID staff, TA providers, and training contractors) identifies the **Partner Organization(s)** that contributes to achieving the intermediate results.

⌘ The extended SO team identifies the individual **Work Group(s)** within the partner organizations that needs to function differently and that will benefit from training interventions.

⌘ The extended SO team clarifies the **Training Application(s)** by identifying specific knowledge, skills, and attitudes that key personnel within the partner organizations and work groups need in order to enhance performance.

⌘ The extended SO team defines specific, measurable objectives that will help focus **Trainee Learning**.

⌘ The extended SO team suggests components of the **Training Event** that will help the event succeed.

⌘ Based on the above information, USAID training contractors and TA providers design training events as part of their **Training Management** responsibilities. This results in the implementation of a training event that is directly related to the targeted SO and IRs.

Using the TRC to *Monitor and Evaluate*

⌘ USAID/W and Missions monitor training contractors and TA providers involved in **Training Management** to determine if they are following USAID rules and regulations. Overall effective/efficient use of resources to meet the Mission's strategic objectives is also monitored.

⌘ Training contractors and TA providers monitor individual **Training Events** through site visits, telephone interviews, and exit questionnaires. Results are included in a final training event report provided to Missions.

⌘ The extended SO team learns the immediate effect of the training on each **Trainee's Learning** from the results of the exit questionnaire, which includes a self-assessment of new knowledge, skills, and attitudes gained. Results are included in the final training event report.

⌘ The extended SO team monitors the **Application** of knowledge, skills, and attitudes in the workplace, over time, through follow-up questionnaires and interviews with selected trainees. Interview results are provided to USAID/W and Missions.

⌘ The extended SO team reviews stakeholder agreements and action plans and compiles success stories to document performance changes in **Work Groups** and **Partner Organizations**. Success stories are provided to Mission management and USAID/Washington. Complementary evaluations may also be conducted to examine particular successes or problems.

⌘ The extended SO team participates in the annual R4 preparation process and identifies if and how training contributed to the targeted **Intermediate Results.**

⌘ The extended SO team uses the R4 preparation process to identify lessons learned. The lessons are used to develop a new training plan that will further the achievement of targeted **Strategic Objectives**.

Link One—Strategic Objective

What is the ultimate result that the Mission wants to achieve?

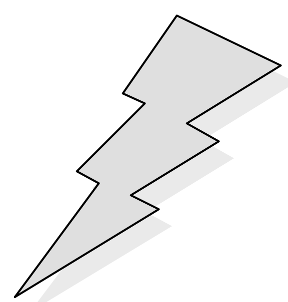
- ⌘ Link One of the TRC helps SO teams clarify which of the Mission **Strategic Objectives (SO)** will be supported by training. SO teams then select one SO to begin the process of designing one or a series of training events.

- ⌘ A **Strategic Objective Team** (SO Team) is a Mission group committed to a specific SO and whose members hold themselves individually and collectively accountable. An SO team includes Mission staff as well as TA providers and training contractors. (The larger group is called an **Extended SO Team.)**

- ⌘ A **Results Framework** (RF) is used to articulate how each SO will be achieved. During development of the RF, the extended SO team identifies if and how training can support achievement of the SO. If training can play a supporting role, it is included in the SO's **Results Package** (RP).

- ⌘ In addition to training, the RP defines all the other tools and inputs (technical assistance, grants and loans, policy dialogue, commodity procurement) that will be required to support the achievement of the SO.

- ⌘ At this initial stage of the TRC, extended SO team members select a specific SO that includes training in the RP. The team then initiates the design of one or more training events.



During the Monitoring and Evaluation (M&E) Phase, you will assess what needs to be done next to achieve or sustain the SO.

Exercise 1

Targeted Strategic Objective

Before beginning this exercise, members of the extended SO teams meet to discuss the training components of the Mission SOs. All SOs that include training components should be discussed.

You are now ready to select one SO and to begin defining specific training events that will support the achievement of that SO.

Enter the selected SO below. This is the beginning of the training design process. You will repeat this exercise for each SO that includes training in the the Results Package.

Targeted SO:

Exercise 2

SO Background Information

Summarize relevant background information about the SO here. Use the Results Framework, R4, and other background documents as references. Focus on training needs identified in the documents.

The information will provide the context for the training event(s) to be designed.

SO Background Information:

Connecting Link One of the TRC to the TEOL

- Now that you have identified the Strategic Objective and reviewed the Results Framework, R4, and other documents in order to summarize relevant background information, you are ready to access the Training Event Request Form on the TEOL. The Training Event Request Form will help you design training events electronically.

- You will find the Training Event Request Form on the TEOL (http://www.enitraining.net). It is the form used to submit a training event request to Mission management for approval and funding. The request will also be forwarded to the E&E Bureau in Washington.

- When the request is approved, the information will be used by the training contractors and TA providers to design the training event.

- The first step in completing the Training Event Request Form is to go to Section A.1 and select the Strategic Objective (SO) that has been identified.

- The second step is to complete Section B.1—Background Information. This section asks you to provide brief background information on the SO that you selected.

You are now ready to complete Sections A.1 and B.1 of the Training Event Request Form.

Link Two—Intermediate Results

What critical results are necessary to achieve the Strategic Objective?

- Link Two of the TRC helps the extended SO team to
  - identify the **Intermediate Results (IRs)** and **Sub-Intermediate Results** (sub-IRs) that can be influenced by training interventions; and
  - initiate a **Performance Monitoring Plan for Training** that identifies **Performance Indicators, Baselines,** and **Targets** to help monitor the effect of training.

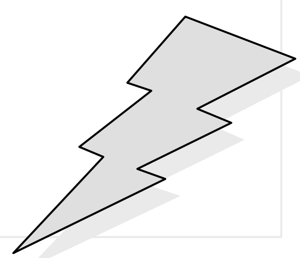
- IRs and sub-IRs are defined as critical results that must occur in order to achieve the SO. IRs / sub-IRs for each Mission SO are listed in the Results Framework and defined in the R4.

- The R4 includes a **Performance Monitoring Plan** (PMP) for each SO. The PMP defines a process for collecting and analyzing data to measure the performance of a program or activity. The PMP measures actual results against expected results. All IRs and sub-IRs are included in the PMP.

- The PMP identifies **Performance Indicators, Baselines,** and **Targets**. The performance indicators are written to help answer “how” or “whether” progress is being made in achieving an IR. (Review the PMP in the Mission R4 document.)

- From information in the overall PMP, you will develop a **Performance Monitoring Plan for Training (PMP-T)** that pulls together all the IRs and sub-IRs of the targeted SO that include training inputs.

- The PMP-T supports both the design and monitoring of training. It provides a reference for the collection and analysis of performance data related to training.



During the M&E Phase, you will assess whether the IRs were achieved and what lessons were learned.

Exercise 3

Identify Intermediate Results and Indicators

⌘ The following two exercises will help you continue the planning process by clarifying the appropriate IRs, sub-IRs, performance indicators, baselines, and targets that need to be considered when designing the training event(s).

⌘ Before completing this exercise, the extended SO team will have met to identify the IRs and sub-IRs under the targeted SO that include training components. The IRs and sub-IRs are defined in the R4, which also includes the Performance Monitoring Plan for the SO.

The extended SO team reviews the Results Framework and R4 for the targeted SO and selects all of the IRs and sub-IRs that could be supported with training.

Enter the IRs / sub-IRs below.

IRs / sub-IRs:

Exercise 4

Performance Indicators, Baselines, and Targets

Record the performance indicators, baselines, and targets for each IR and sub-IR that will be influenced by training (from Exercise 3).

Identify the indicators that can be used to help measure the results of training.

Performance Indicator:

Baselines:

Targets:

Preparing a Performance Monitoring Plan for Training

⌘ Now that you have identified the target SO and selected the IRs and sub-IRs, performance indicators, baselines, and targets related to training, you are ready to initiate a **Performance Monitoring Plan for Training (PMP-T).**

⌘ The extended SO team will initiate the PMP-T during the planning phase and return to it during the monitoring and evaluation stage to review the results of the training program for each SO. The PMP-T includes a plan for data collection and a plan for data analysis and use.

⌘ The plan for data collection includes the following:
- a detailed definition of each performance indicator related to training at the SO, IR, and sub-IR levels; and
- the source, method, frequency, and schedule of data collection and the office, team, or individual responsible for ensuring that data are available on schedule.

⌘ The plan for data analysis and use includes the following:
- summaries of training reports, follow-up interviews, success stories, and complementary evaluations; and
- use of key findings for both planning the next series of training events and informing the R4 process.

⌘ The PMP-T's data analysis, reporting, and application stage form the backbone of the monitoring and evaluation phase of the TRC.

Complete Parts 1 and 2 of the PMP-T now by filling in the forms on the next two pages for each targeted SO and IR. Use the information in the Mission's overall Performance Monitoring Plan. You will return to these documents during the monitoring and evaluation phase of the TRC (see chapter 5).

Performance Monitoring Plan for Training
Part 1: Performance Monitoring Plan for Each Targeted Strategic Objective and Intermediate Result

Performance Indicator	Indicator Definition and Unit of Measurement	Data Source	Method/ Approach to Data Collection	Data Acquisition		Analysis and Report	
				Schedule Frequency	Responsible Office/ Individual	Schedule by Report	Responsible Office/ Individual
Targeted SO							
1	Definition: Unit:						
2	Definition: Unit:						
3	Definition: Unit:						
IR							
1	Definition: Unit:						
2	Definition: Unit:						
3	Definition: Unit:						

Complete a separate form for each targeted SO, IR, and sub-IR.

Performance Monitoring Plan for Training
Part 2: Baseline, Expected Results, and Actual Results for Each Targeted SO/IR

Performance Indicator	Indicator Definition and Unit of Measurement	Baseline Data		Expected and Actual Results					
		Year	Value	1999		2000		2001	
				Expected	Actual	Expected	Actual	Expected	Actual
Targeted SO									
1	Definition: Unit:								
2	Definition: Unit:								
3	Definition: Unit:								
IR									
1	Definition: Unit:								
2	Definition: Unit:								
3	Definition: Unit:								

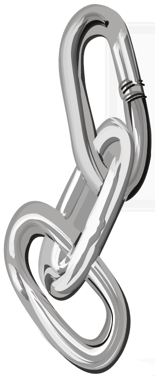
Complete a separate form for each Performance Indicator.

Connecting Link Two of the TRC to the TEOL

- ⌘ Now that the extended SO team has identified the targeted IRs, you are ready to continue filling in the Training Event Request Form on the TEOL. Go to Section B.2: Intermediate Results and Section B.3: Performance Indicators, Baselines, and Targets.

- ⌘ Use the information from Exercises 3 and 4 to complete Section B.2.

You are now ready to complete Sections B.2 and B.3 of the Training Event Request Form.



Link Three—Partner Organizations

Which partner organizations contribute to the achievement of the IRs?

⌘ Link Three of the TRC helps the extended SO team identify the **Partner Organizations (POs)** that are critical to the achievement of the targeted SO and IRs. Trainees will be selected from the partner organizations.

⌘ A partner organization is defined as an institution or organization with which USAID works cooperatively to achieve mutually agreed upon objectives and intermediate results. Partner organizations are the beneficiaries of training and can include

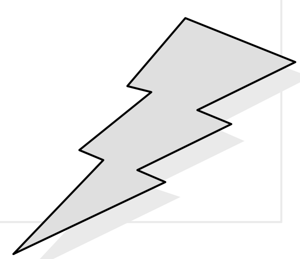
- a group/local entity such as a small business association or professional association;
- a single NGO or group of NGOs;
- a formal institution such as a Ministry; and/or
- a university or school.

⌘ The first step is to identify which part of the the partner organization's work is directly related to achieving the SO and to understand which of the PO's functions can be strengthened through training.

⌘ A **Needs Assessment** (NA) will help identify the functions within each partner organization that need to be improved to support the achievement of the SO.

The following page illustrates the types of information that can be collected by undertaking a comprehensive NA.

A mapping exercise follows to identify POs and their performance needs.



During the M&E Phase, you will assess whether the partner organization improved its performance because of training.

Needs Assessments

- Two different types of Needs Assessments are
  - a comprehensive needs assessment; and
  - a targeted needs assessment.

- A comprehensive needs assessment includes a detailed organizational analysis that can be extremely time consuming. It is usually conducted by a training specialist or organizational development specialist.

- A targeted NA identifies specific needs based on what is already known about an organization. Extended SO teams play an important role in determining the organization's performance needs.

- The following types of information are collected in a comprehensive needs assessment:
  - goals and mission of the organization;
  - management structure;
  - financial viability;
  - specific expectations of training and non-training interventions;
  - how managers and supervisors will support the integration of the new knowledge and skills into the organization or work group; and
  - information about key personnel, such as
    - individuals who are integral to achieving the organization's goals,
    - job responsibilities of key personnel,
    - description of key personnel's work experience,
    - types of training received in the past,
    - critical functions that key personnel must be able to carry out in order to accomplish the organization's goals,
    - major performance constraints that hinder the ability of key personnel to perform their jobs effectively, and
    - specific knowledge and skills needed to enhance the performance of key personnel.

Exercise 5

Partner Organization Mapping (Targeted Needs Assessment)

To create a clear picture of the Partner Organizations that have a stake in the achievement of the Mission's Strategic Objective, answer the following questions:

- Which Partner Organization(s) is working on the relevant SO/IR?
- Who is the point of contact for the PO?
- What part of the work is directly related to achieving the SO?
- What functions can training help improve?

PO #_____

2. Partner Organization:_______________

PO Point of Contact Information:

____

3. History of USAID and other donor assistance to this partner organization:

•

1. Which POs are involved in achieving the targeted SO?

4. What functions of this PO will training help improve?

5. Identify major performance gaps in the PO:

Link Four—Work Groups

Which key parts of the organization need to function differently?

⌘ Link Four of the TRC is used to identify a specific **Work Group(s)** that needs to function differently and whose staff will benefit from training.

⌘ A work group is defined as the functional team or a part of an organization where the most immediate performance improvements are needed. A work group may consist of

- a department within an organization;
- a team of managers from different parts of the organization;
- the management group of an NGO or professional association;
- employees from several branches of a company located in different regions of the country; or
- a group of NGO leaders.

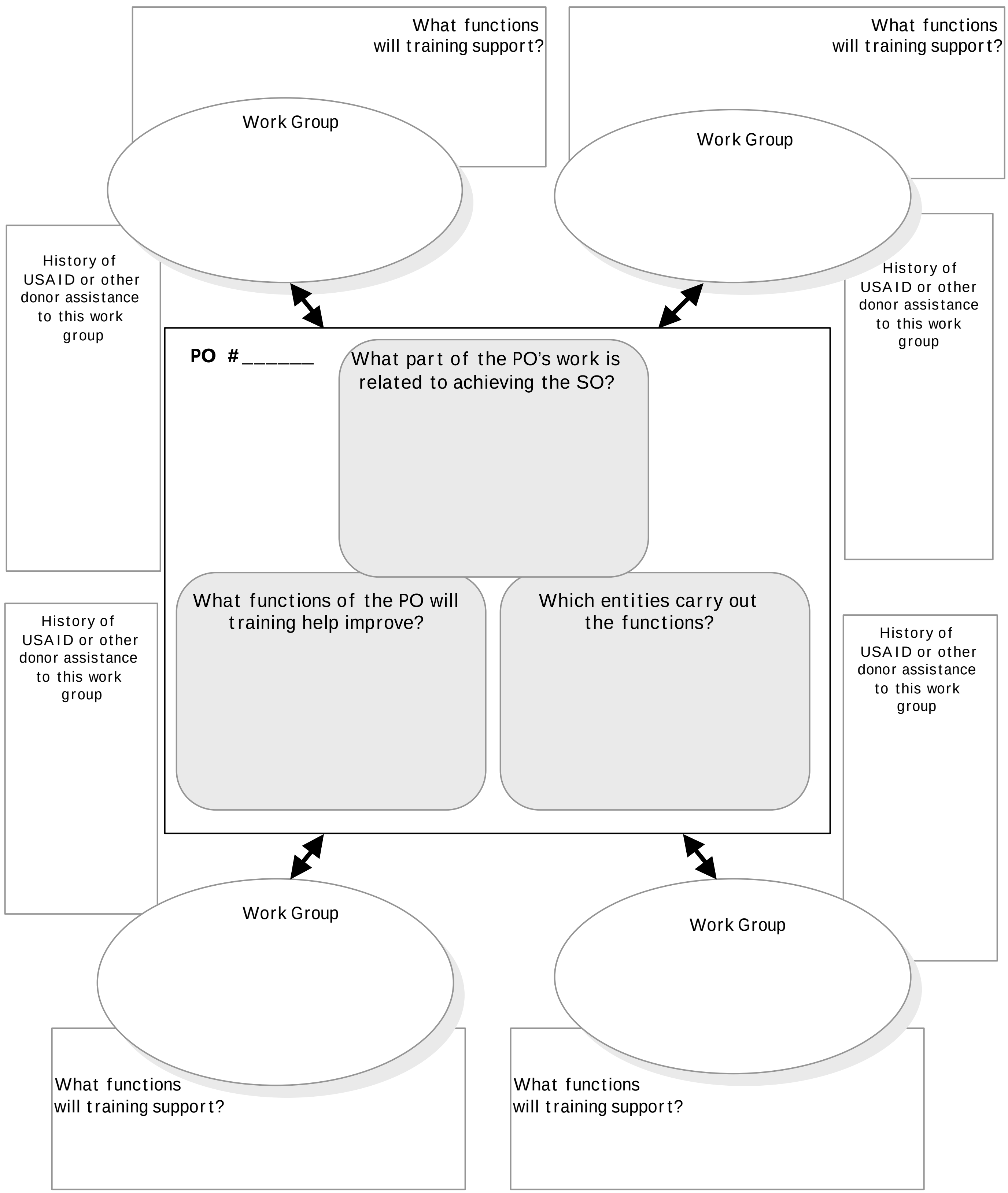
⌘ The extended SO team will use the results of the targeted needs assessment discussion to identify those work groups whose performance gaps could be addressed through training. The training should be designed to address directly the key parts of the work group that need to function differently.

The next exercise expands the organizational map previously developed to include linkages to the different work groups within the partner organizations.

During the M&E Phase, you will assess the impact of training on the work group.

Exercise 6

Work Groups



Connecting Links Three and Four of the TRC to the TEOL

⌘ By this stage of the TRC planning process, you have identified the targeted strategic objective, intermediate results, performance indicators, baselines, and targets that can be supported by training. You are also familiar with the Results Framework and the R4.

⌘ You have identified the partner organizations and work groups that will be supported by the training. You have also reviewed the results of the targeted needs assessment to identify the specific performance gaps that can be influenced by training.

⌘ You are now ready to complete Section B.4 of the Training Event Request Form, which asks you to identify the targeted partner organizations and work groups and to define performance gaps and needs. You will use data from the needs assessment, mapping exercises, and other relevant information about partner organizations and work groups whose employees will participate in the training.

⌘ Section B.4a requests information about the partner organizations and work groups to be supported by the training event. It also asks for a description of the functions of the partner organizations / work groups and how those functions relate to the achievement of the targeted SO and IRs.

⌘ Section B.4b requests information on the performance problems that need to be addressed through training.

⌘ Section B.4c asks for a brief history of USAID and other donor assistance to the partner organizations and work groups.

You are now ready to complete Sections B.4a, b, and c of the Training Event Request Form.

Link Five—Training Applications

What do key personnel need to do differently? What new knowledge, skills, and attitudes do they need?

⌘ Link Five of the TRC specifies **Training Applications.** It asks the extended SO team to define what is expected from the training and what needs to happen in a targeted partner organization and work group and at the individual trainee level for performance to improve.

⌘ Link Five asks the extended SO team to identify the following:

- performance gaps within the organization / work group;
- key personnel in the organization who need to be trained;
- new knowledge, skills, and attitudes needed;
- types of training needed to improve performance;
- pre- and post-interventions needed to support the application of the training; and
- changes needed in the organizational environment to support the application of the training.

⌘ One training event may not be enough to solve a performance problem. A series of training and non-training interventions might be needed to support performance change. Training and non-training interventions may include the following:

- study tours to the U.S. or a third country;
- interactive training sessions;
- on-the-job training and mentoring;
- training-of-trainers sessions;
- organizational and policy changes; and/or
- technical assistance (TA) interventions and commodity procurement.

⌘ At this stage of the TRC, the extended SO team should consider all training and non-training interventions that will be needed to support a performance change.

The following definitions of knowledge, skills, and attitudes as well as exercises will help define what needs to happen in an organization and at an individual level to improve performance.

During the M&E Phase, you will assess whether new knowledge, skills, and attitudes were transferred to the workplace

Knowledge, Skills, and Attitudes*

Training is used to reinforce or bring about changes in the KNOWLEDGE, SKILLS, and ATTITUDES (KSAs) of trainees. Training provided for E&E trainees focuses primarily on skill development.

⌘ **KNOWLEDGE**

Knowledge deals with cognitive aspects of comprehension, which include acquiring and internalizing data. Much of the formal and informal education that takes place around the world focuses on knowledge learning, from simple arithmetic to complex frameworks or theories. Acquiring or reinforcing knowledge is an important step in the learning process, but it is only a step. Trainees need to develop skills to apply knowledge concepts so that they may use those concepts effectively in their work.

⌘ **SKILLS**

Skills include a range of intellectual and physical abilities that may be required for effectiveness in the workplace. Trainees can develop the following three categories of skills:

- analysis, synthesis, and evaluation skills;
- physical, motor, and mechanical skills; and/or
- interpersonal skills.

⌘ **ATTITUDES**

Attitudes describe how we act, feel, or think based on our disposition, opinions, values, and other factors. Our attitudes and values are shaped by messages received throughout our lives and the degree to which we internalize them. Our behaviors can be external manifestations of our attitudes and values, the reflection of our personality type, or a measure of the skills we have developed in spite of our attitudes and personality.

Although training often seeks to affect attitude, it is extremely difficult to measure attitude changes during a single training event. It is probably more realistic to aim for greater awareness and appreciation of various points of view. It is hoped that trainees will reinforce or adopt new behaviors that reflect attitude changes when they are back in their partner organization or work group.

* Adapted from Training Resources Group, Inc., Creating Effective Training course material.

Exercise 7

Identify Performance Gaps and Potential Types of Trainees

1. Define the specific performance gaps training will address.

2. Identify the specific job functions that need to be improved to fill the identified performance gaps.

   A. What new knowledge is needed?

   B. What new skills are needed?

   C. What attitude / awareness changes are needed?

3. Identify the individuals who currently perform the specific job functions.

4. What specific job functions / activities will individuals be expected to perform if they participate in training?

5. How will training improve the performance of the partner organization and work group?

Exercise 8

Training Inputs

1. Suggest the types of training interventions that will be needed to improve the performance of the partner organization or work group. Interventions may include
   - one training event or a series of training interventions;
   - a combination of workshops, on-the-job training, mentoring, and TA support; and
   - training in-country, in the U.S. , or in a third country.

2. Remember the SO and IR that you have targeted. Prioritize each proposed training event based on the following rankings:

   Rank A. Highest Priority—Extremely vital to the successful achievement of the SO/IR

   Rank B. Secondary Priority—Important or desirable but not vital to the achievement of the SO/IR

3. Identify where within the above rankings the priority for this event falls (select one):

   Rank A
   - A1—SO/IR cannot be achieved without it.
   - A2—SO/IR unlikely to be achieved without it.
   - A3—SO/IR attained with difficulty without it.

   Rank B
   - B1—Highly important or desirable.
   - B2—Important or desirable.
   - B3—Reasonably important or desirable.

Exercise 9

Enabling Environment

1. What pre- and post-training activities will be needed to support the application of on-the-job training? Who will be responsible for the pre- and postwork?

   <u>Training Event Name</u>

   - Prework (orientation, briefings)
   - Postwork (on-the-job mentoring, coaching)

2. What in-country activities will be offered by the trainees after the training to maximize the impact of the training (seminars, workshops, informal presentations)?

   - Who will be responsible for organizing these events?

3. Specify the changes in the work environment that will be necessary to enable these results to occur (implementation of new policies and procedures, procurement of new equipment, supervisory and management support).

Connecting Link Five of the TRC to the TEOL

⌘ It is now time to complete Section B.5 of the Training Event Request Form, which requests information on the following:

- KSAs that the training event needs to address to improve the identified performance gaps;
- individual job performance and expected results attained from attending the training event; and
- changes needed in the organization that will support the application of the training when trainees return to their job.

⌘ Section B.5a requests information on the performance issues to be addressed.

⌘ Section B.5b asks for information on what the trainees will be responsible for when they return to work.

⌘ Section B.5c requests information on the types of changes needed in the work environment to sustain the results of the training.

You are now ready to complete Section B.5 of the Training Event Request Form.

Link Six—Trainee Learning

For changes to occur, what do trainees need to learn or be able to do?

⌘ In Link Six of the TRC, the extended SO team defines the specific, measurable objectives that will help focus the **Trainee Learning**.

⌘ During this step, training objectives are agreed to that clearly state what the trainee will be expected to do after the training has concluded.

⌘ A stakeholder agreement and initial action plan are developed during this stage of the TRC. The agreement and action plan are written agreements among the trainee, the partner organization, the work group, and USAID. The agreement and action plan specify the performance change targets for the trainee and identify how the organization will support the trainee in applying the new knowledge and skills on the job.

The following exercises will help you formulate specific training objectives and draft a stakeholder agreement/action plan.

During the M&E Phase, you will assess whether the trainees thought they achieved the objectives of the training.

Writing Training Objectives

⌘ Both trainees and training providers need a clear idea of the expected results of a training event. The trainees want to see how the training will help reinforce or increase their knowledge, skills, and attitudes. The training providers and training managers use objectives to make important design decisions, including the following:

- how much time to spend on a given subject;
- what types of learning activities are appropriate;
- what resources are needed; and
- what evaluation criteria to use.

⌘ Training Objectives should be **SMART**

Specific	A statement of exactly what the learner will be able to do or say
Measurable	The trainer can observe progress during the session
Action Verb	The verb should be action-oriented
Realistic	The objective needs to be doable by the trainees
Time-bound	The objective should be achievable by the end of the session

List of Action Verbs and Imprecise Verbs

- Measurable Action Verbs
  - Below are some suggested verbs you can use when developing "learner-centered" objectives

Identify
List
Develop
Explain
Make
Use
Define
Ask
Provide
Review
Compare
Contrast
Conduct
Demonstrate

- Imprecise Verbs
  - Below are some verbs that should be avoided when developing "learner-centered" objectives

Know
Learn
Feel
Understand
Attain
Appreciate
Like
Gain
Deal
Become acquainted with

Sample SMART Objectives

By the end of the training event, trainees will be able to

OBJECTIVE	TYPE OF OBJECTIVE
1. Identify three to four factors that could substantially contribute to the development of Small and Medium Enterprises (SME) in (country).	**Knowledge**
2. Design a training session on the factors necessary to implement SME in (country).	**Skill**
3. Develop a greater appreciation for the need to promote international collaboration and networking in the SME sector.	**Attitude**

Exercise 10

Objective Writing—Practice Exercise

Below are poorly written training objectives. Use the space next to each objective to rewrite the objective with action verbs.

By the end of the training event, trainees will be able to

EXAMPLE OBJECTIVE	REWRITTEN OBJECTIVE	TYPE
1. Understand a new style of corporate management.		**Knowledge**
2. Become acquainted with financial accounting methods.		**Skill**
3. Appreciate the importance of policy reform.		**Attitude**

Exercise 11

Training Event Objectives

Before writing the objectives for the training event, review the following:

- IRs, sub-IRs, and indicators;
- the knowledge, skills, and attitudes the training event should address;
- the results of exercises 1-10; and
- the Performance Monitoring Plan for Training.

There may be more than one objective related to knowledge and/or skills.

By the end of the training event, trainees will be able to

OBJECTIVE	TYPE
1.	Knowledge
2.	Skill
3.	Attitude

Stakeholder Agreement and Action Plan

⌘ At this stage of the planning process, the **Stakeholder Agreement** and initial **Action Plan** are developed. A stakeholder agreement may be generic for all trainees attending a given training event or specific for an individual trainee.

⌘ A Stakeholder Agreement is a formal agreement among appropriate stakeholders, including the trainee, the Mission, the trainee's employer, the training contractor, the TA provider, and training providers. The agreement includes objectives, a timetable, and a set of outcome measures. The agreement also includes an initial action plan of how the trainee plans to use the new knowledge and skills upon returning to the job.

⌘ A stakeholder agreement usually includes the following:

- a definition of expected training outcomes in terms of performance;
- the length of time the trainee is expected to stay on the job after returning to the job; and
- an initial action plan that clarifies
  - expectations of trainees and training providers,
  - how trainee(s) will use the new skills on the job,
  - how trainee(s) will share expertise when they return to work,
  - how technical advisers will support trainee(s) in implementing the new skills on the job, and
  - how the partner organization and work group managers and supervisors will support trainees' efforts to apply the new knowledge and skills.

⌘ Trainees complete their Action Plans during the training event when they have a better understanding of how the training will apply to their work.

The next two pages include a prototype stakeholder agreement and outline of an action plan.

The first step in drafting the stakeholder agreement and action plan is to interview trainees and supervisors to clarify the objectives of the training event and to discuss how the results will be implemented. the exercise will help you prepare to develop a stakeholder agreement and an action plan.

Sample Stakeholder Agreement

PART A—Training Outline

1. World Learning—Training for Europe agrees to provide, through the Training Provider, ___________, short-term training in the area of________________________________ designed to address USAID/_______'s Strategic Objective #_____: (description) _______________________________
Intermediate Result #_____: (description) ____.
2. The training will include practical, technical training in the content areas of
a)____,
b) ____, and
c) ____.
3. Specific skills to be developed include a) ____,
b) _______________________________, and c) ____.
4. The ultimate goal of the training is to enable the trainees to _____________ ____________ to use back on their organization (see attached action plan).

PART B—Trainee Agreements

The following trainees agree to participate to the best of their ability in the above training, resume their positions upon completion of the training, and work in their organizations to achieve the following outcomes:

- present to other members of their organizations a general overview of effective techniques and lessons learned during the training; and
- with the help of a technical adviser, adapt lessons learned as a result of the training to the reality of their own organization/country and develop and implement an action plan to ____.

Trainee Name ______________________________ Title ___________________ Date ____________

Trainee Name ______________________________ Title ___________________ Date ____________

Trainee Name ______________________________ Title ___________________ Date ____________

PART C—Supervisory/Managerial Agreements

The supervisors of the above trainees agree to allow their employees to participate in the above training and, upon their return, to resume their positions for a minimum period adequate to implement the action plans agreed upon as a result of the training. They, moreover, pledge to support the implementation of agreed-upon action plans in whatever way possible.

Name ____________________________________ Title ___________________ Date ____________

Name ____________________________________ Title ___________________ Date ____________

PART D—Approval

USAID/_____________ approves of the training mentioned above and will support follow-up toward achievement of the Intermediate Results addressed.

Name ____________________________________ Title ____________________ Date ___________

Guidelines for Developing an Action Plan

Name of Trainee: Country:
Name of Training Event:
Training Dates:
Strategic Objective / Intermediate Results Addressed by Training Event:

I. Introduction

A. Brief Description of the Current Situation

B. Diagnosis of the Problems
1. Describe the problems
2. Explain why they are problems
3. Describe who is affected by the problems

C. Analysis of the Problems
1. Describe the external environment
2. Describe the internal capabilities of the institution
3. Analyze how these factors contribute to the problems

II. Objectives
A. Formulate overall goal(s) for the organization
B. Formulate specific, measurable objectives to meet the goals

III. Strategy
Formulate a set of concrete steps or actions to accomplish the goals, focus on how the KSAs gained during training will be used

IV. Implementation Plan
A. Specific Action
B. Time Frame
C. Resources Available
D. Resources Needed (staffing, budget, equipment, policies)
E. Evaluation (how progress and success will be evaluated)

This prototype Action Plan was compiled from AED and World Learning examples.

Exercise 12

Stakeholder Agreement and Initial Action Plan Preparation

To develop the stakeholder agreement and initial action plan, hold a conversation with stakeholders, including trainees and supervisor, by using the following discussion guide.

Discussion Guide

⌘ The following can be used with trainees to help develop the stakeholder agreement:

1. Please explain your organization's goals and mission
2. Describe your position / department / institution
   - What do you do?
   - Whom do you work with?
   - How many people do you supervise?
   - Who are your clients or customers?
3. What specific knowledge or skills do you think you need to do your job better?

<u>Initial Action Plan</u>

4. What specific plans do you have to use the new knowledge and skills when you return to your job?
5. How will you share with coworkers and staff the expertise you have gained when you return to your job?
6. Identify the support you expect from the technical advisers when you return to your job.
7. What support will you need from your organization / work group to ensure that you will be able to apply your new knowledge and skills when you return to your job?
8. How will you evaluate progress and success in implementing your action plan?
9. If you are selected to participate in the training event, are you willing to stay on the job for at least ___ months/years after returning? Are you willing to sign an agreement to that effect?

The results of this exercise can be used to help in the development of the stakeholder agreement / action plan.

Connecting Link Six of the TRC to the TEOL

- Section B.6 of the Training Event Request Form asks for information on the objectives of the training event and for clarification of the expected, measurable outcomes of the training event.

- Use the results of the objective writing exercise, stakeholder agreement, and initial action plan to complete Section B.6.

You are now ready to complete Section B.6 of the Training Event Request Form.

Link Seven—Training Event

What does the training event need to have or do so that trainees learn effectively?

⌘ Link Seven of the TRC provides an opportunity for members of the extended SO team to suggest components of the **Training Event** that will help the training succeed. The training provider will use the suggestions to design the training event.

⌘ This subchapter of the workbook begins with an overview of the Experiential Learning Cycle (ELC), an approach to adult learning that builds on trainees' existing knowledge and skills. This information will help you clarify the types of methodologies you may want to suggest to the training providers to help trainees achieve the training objectives. The training providers will use the suggestions from the extended SO team to design the training event.

⌘ This section also asks extended SO teams to prioritize the training event in terms of funding availability.

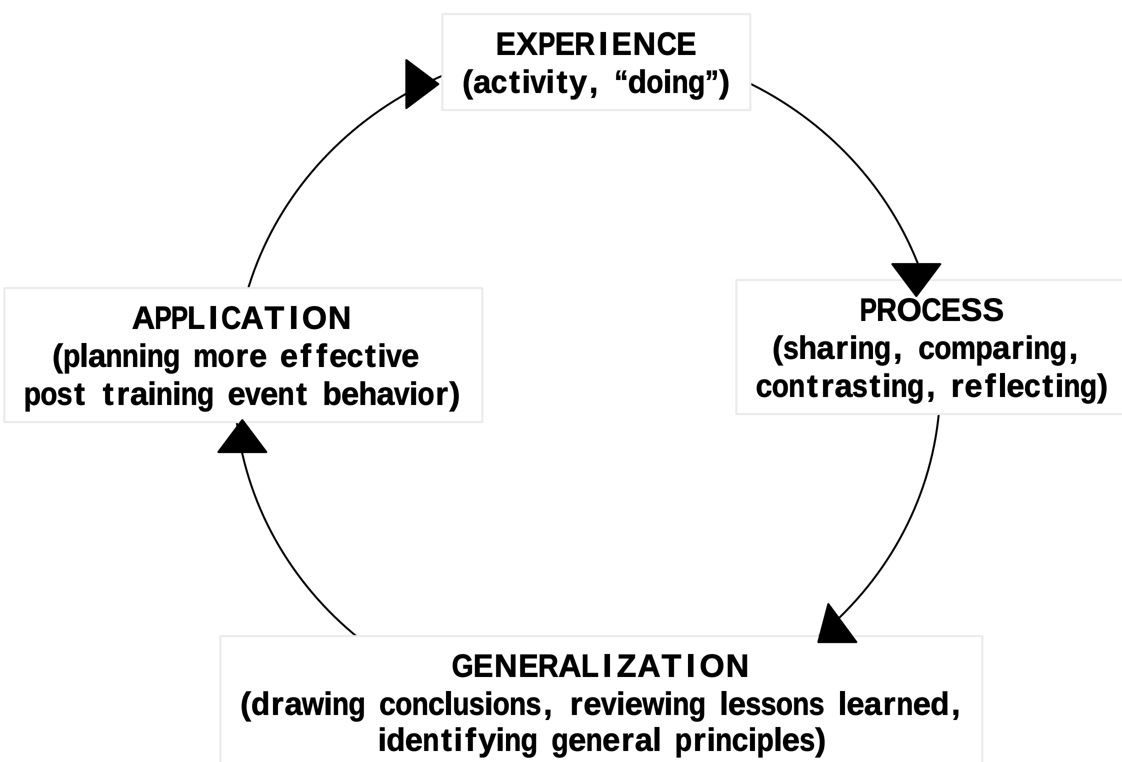
During the M&E Phase, you will review how well the training event was implemented.

Adult Learning—The Experiential Learning Cycle*

⌘ Experiential learning is exactly what the name implies—learning from experience. The experiential approach is learner-centered and allows individual trainees to manage and share responsibility for their own learning with the trainers. Effective training strategies that incorporate experiential learning approaches provide opportunities for a person to

- engage in an activity;
- review the activity critically;
- abstract some useful insight from an analysis of the activity; and
- apply the result in a practical situation.

⌘ A graphic representation of the model is presented below and may be applied to cross-cultural training in the following ways:



* Excerpted from "The Experiential Learning Cycle," by James McCaffrey, Training Resources Group, Inc., 1990.

Experience Stage

⌘ The experience stage is the initial activity and the data-producing part of the experiential learning cycle. It is structured to enable participants to become actively involved in "doing" something. Doing, in this instance, is broadly defined and includes a range of activities such as
- case studies;
- role plays;
- simulations;
- games;
- lecturettes, defined as interactive, participatory presentations;
- videos and films; and
- skill practice.

⌘ The above list indicates that the range of training techniques varies from the more passive and artificial (videos and films) to the more active and real (skill practice). Exactly which technique is chosen as an educational activity depends largely on the session goals.

Process Stage

⌘ Once the experience stage is completed, the trainer guides the group into the process stage of the cycle. During this stage, trainees reflect on the activity undertaken during the experience stage and share their reactions in a structured way with the whole group. Sharing may take place on an individual basis, in small groups, or in a full training group. Individuals share both their cognitive and affective reactions to the activities in which they have participated. In addition, with trainer assistance, they try to link their thoughts and feelings in order to derive some meaning from the experience.

⌘ The trainer's role is to help trainees think critically about the experience and to help them verbalize their feelings and perceptions as well as draw attention to any recurrent themes or patterns that appear in their reactions to the experience. The trainer's role involves helping the trainees conceptualize their reflections on the experience so they can move toward drawing conclusions.

Generalization Stage

⌘ The generalization stage asks trainees to extract conclusions and generalizations from the first two stages of the cycle. During this stage, trainees are asked to "take a step back" from the immediate experience and discussion and to think critically in order to draw conclusions that might be generalizable to "real life" or to a particular theoretical construct. This stage is perhaps best symbolized by the following questions:
- What did you learn from all this?
- What more general meaning does this have for you?

- The trainer structures the generalization stage of the experiential learning cycle so that trainees first work alone. The trainer then guides trainees into sharing conclusions with each other so that individuals may serve as catalysts for one another. The trainer helps facilitate the generalization stage by
  - asking and helping individuals summarize what they have learned into concise statements or generalizations;
  - "pushing back" at trainees to help make their thinking more rigorous;
  - summarizing and then integrating the trainees' conclusions into a theoretical model;
  - making sure, within reasonable time boundaries, that everyone who wishes to share significant insights gets a chance to contribute; and
  - helping the group compare and contrast different conclusions, identify patterns, and discuss legitimate areas of disagreement.

Application / Action Plan Stage

- After trainees have completed some focused work on generating generalizations, they are guided into the application stage. Drawing on insights and conclusions they have reached during the previous stages, trainees incorporate what they have learned into their lives by developing action plans for more effective behavior in the future. In an ideal training event, trainees would be able to apply what they have learned immediately after the workshop ends. The action plan they develop should build on the action plan initiated before the training event. The plan should relate to the performance needs of the partner organization or work group and should strengthen the partner organization's ability to contribute to the achievement of SO/IRs.

- Techniques used to facilitate the application stage include the following:
  - Individuals work to develop a thoughtful action plan that puts "thought into action."
  - Trainees review each other's plans and consult with and help one another as appropriate.
  - Some parts of individual action plans might be shared with the whole group to create a sense of synergy.

- One way the trainer assists is by helping trainees be as specific as possible in developing their action plans.

Training Methodologies

- Trainers apply the ELC to several different methods to help trainees learn. Methods include role plays, case studies, simulations, focused discussion sessions, structured field trips, action planning exercises, practice sessions, and hands-on training in the use of new techniques or methods.

Exercise 13

Adult Learning Methodologies

1. Suggest the learning methodologies you think will support the achievement of the training objectives (select all that apply).

   _____ Workshops / training courses (including interactive lecturettes, focused discussion sessions, simulations, case studies, projects, and action plans)
   _____ Observational study tours
   _____ Conferences
   _____ On-the-job (OJT) training
   _____ Training-of-trainer (TOT) sessions
   _____ Sharing of best practices with subject matter experts
   _____ Hands-on computer software training

2. What other types of learning methods do you think might be useful to help trainees achieve the training objectives?

Exercise 14

Funding Priority

Before completing the exercise below, consult with the extended SO team and others (Mission management, other training personnel) to ascertain how vital the training event will be to the the successful achievement of the SO and IRs. Refer to the results of Exercise 10

1. Does the SO team consider the training event to be (select one)

_____ Rank A   Highest Priority—Extremely vital to the successful achievement of the SO/IR

OR

_____ Rank B   Secondary Priority—Important or desirable but not vital to the achievement of the SO/IR

2. Within this rank, what priority does the SO team assign to this event (select one)?

Rank A

___A1—SO/IR cannot be achieved without it.
___A2—SO/IR unlikely to be achieved without it.
___A3—SO/IR attained with difficulty without it.

Rank B

___B1—Highly important or desirable.
___B2—Important or desirable.
___B3—Reasonably important or desirable.

Connecting Link Seven of the TRC to the TEOL

⌘ You are now ready to supply the requested information for Sections B.7 and B.8 of the Training Event Request Form.

⌘ Section B.7 requests suggestions for training event components.

⅄ Identify the various learning methods and approaches that will be incorporated into the training event (refer to your responses to exercise 16). For example, methods and approaches include

– workshops / training courses (including interactive lecturettes and focused discussions, simulations, case studies, projects, and action plans);
– observational study tours;
– conferences;
– on-the-job (OJT) training;
– training-of-trainer (TOT) sessions;
– sharing best practices with subject matter experts; and
– hands-on computer software training.

⌘ Section B.8 asks you to identify the priority for funding the training event.

⅄ Remember to consult with SO team members and office directors before assigning a funding priority to the training event.

You are now ready to complete Sections B.7 and B.8 of the Training Event Request Form.

Link Eight—Training Management

What will training managers/organizers do to ensure a high-quality learning event?

- Link Eight of the TRC focuses on **Training Management**. At this point in the chain, USAID relies on training contractors and TA providers to design the planned training event in accordance with the information provided in the Training Event Request Form on the TEOL, the stakeholder agreement, and the initial action plan.

- As part of their responsibilities, training contractors and TA providers ensure that the event not only meets the policies and procedures of USAID but that it will also contribute to the achievement of the identified SO and IRs.

- The information in the Training Event Request Form is used by training contractors and TA providers to design a training event. Section C: Training Management requests several additional pieces of information that are needed to initiate design of the event.

During the M&E Phase, you will review whether good training management practices were followed.

Exercise 15

Training Management Considerations

Before completing the exercise below, the extended SO team should consult with the partner organizations and work groups to identify other pertinent information that will affect the design and delivery of the training event. These special considerations should include any information that, if not considered, could negatively affect the quality and effectiveness of the training.

1. Record any **Special Considerations** that must be taken into account in the design and delivery of the training event. Examples of special considerations include, but are not limited to, the following:
   - course materials in both English and the host-country language;
   - course materials available to trainees X number of days in advance of the training;
   - special safety clothing available to the trainees to tour X facilities; and
   - a training-of-trainers component included in the training event.

2. Provide any additional background information to clarify the special considerations.

Exercise 16

Training Event Information

1. What is the title of the training event?

2. Specify where the training event will take place (in-country, in the U.S., or in a third country).

3. What type of course is the training event (new, repeat, modification of previously funded event)?

4. When will the training event take place (identify the quarter and year)?

5. How many trainees (men and women) will participate in the training event? Identify them, including the partner organization / work group they represent.

6. Identify any organizations / institutions that may be appropriate to receive the Request for Proposal (RFP) for the training event.

Connecting Link Eight of the TRC to the TEOL

⌘ You are now ready to transfer the information gathered in Exercises 18 and 19 to Section C of the Training Event Request Form.

⌘ Section C.1 asks for additional information that must be considered in the design and delivery of the training event.

- Enter any special considerations you listed in Exercise 18. Be as specific and detailed as possible.

⌘ Section C.2 requests information on the suggested event title.

- Be descriptive and brief.
- Use commonly known abbreviations and acronyms where appropriate.
- Only the first 30 characters of the title you enter will be listed in the Training Event Request Form summary view screens.

⌘ Section C.3 requests information on the proposed training venue.

⌘ Section C.4 requests information on the type of course to be planned.

⌘ Section C.5 asks for the dates of training.

⌘ Section C.6 requests information on the number and types of trainees who will attend.

⌘ Section C.7 requests suggestions for any organization / institution that may be appropriate to receive the RFP.

You are now ready to complete Section C of the Training Event Request Form.

Chapter 5:
The Training-for-Results Chain—Monitoring and Evaluation Phase

Introduction to the Monitoring and Evaluation Phase

Link Eight—Training Management

Link Seven—Learning Event

Link Six—Trainee Learning

Link Five—Training Applications

Link Four—Work Groups

Link Three—Partner Organizations

Link Two—Intermediate Results

Link One—Strategic Objective

Introduction to the Monitoring and Evaluation Phase

- You are now ready to begin working your way back up the right-hand side of the TRC—the **Monitoring and Evaluation (M&E)** phase. This part of the chain identifies the effect of training interventions on both the individual trainee and the partner organization and work group.

- During the M&E phase, Mission staff, training contractors, and TA providers gather data to help determine how the training may have influenced the achievement of the targeted SO and IRs. Resource availability will determine the level of monitoring and evaluation.

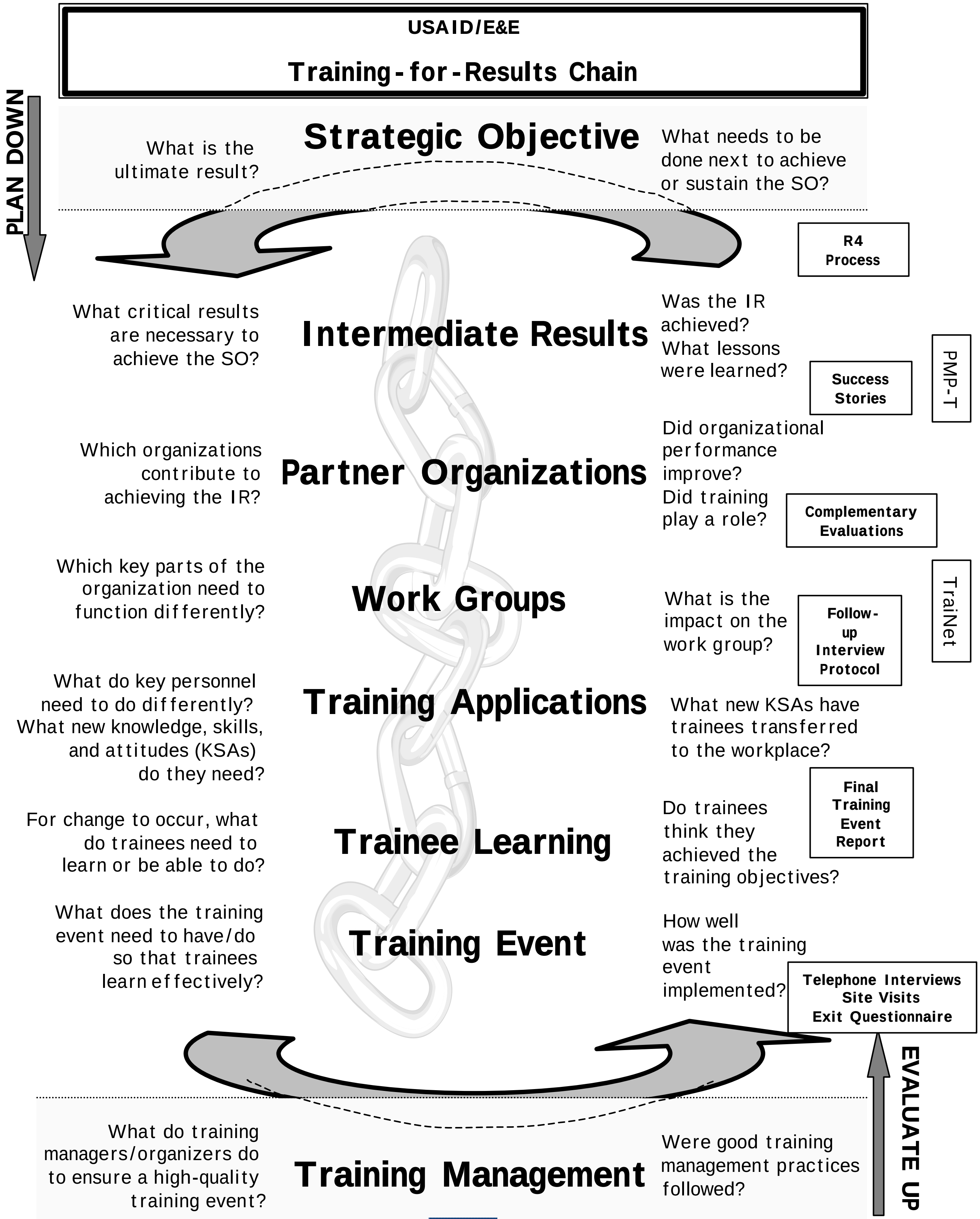
- Chapter 5 is divided into eight subchapters and highlights the M&E instruments that are used by USAID to identify training results. The subchapters describe the monitoring and evaluation processes used to gather and analyze data at each link of the Training-for-Results Chain.

- The monitoring and evaluation data provide input for the following:
  - TraiNet, a database used by the Global Bureau to compile and report information on USAID-funded training;
  - the Performance Monitoring Plan for Training (PMP-T); and
  - the R4, the mechanism used by USAID to review results and request resources.

- Data can also be used to identify lessons learned at each link of the planning stage and to determine the effectiveness of the planning effort in designing training to address the identified performance gaps. The lessons learned will help during the next planning phase.

- The M&E results can be used to justify the integration of training into ongoing Mission programs. (Review the TRC with the monitoring and evaluation tools and the Performance Monitoring Plan for Training template on the following pages.)

- This phase of the TRC uses two types of evaluation as follows:
  - monitoring and evaluation of the training process;
  - evaluation of the results of training
    - at the individual trainee level and
    - at the organizational performance level.



http://www.enitraining.net
http://www.info.usaid.gov/regions/eni

Performance Monitoring Plan for Training
Part 1: Performance Monitoring Plan for Each Targeted Strategic Objective and Intermediate Result

Performance Indicator	Indicator Definition and Unit of Measurement	Data Source	Method/ Approach to Data Collection	Data Acquisition		Analysis and Report	
				Schedule Frequency	Responsible Office/ Individual	Schedule by Report	Responsible Office/ Individual
Targeted SO							
1	Definition: Unit:						
2	Definition: Unit:						
3	Definition: Unit:						
IR							
1	Definition: Unit:						
2	Definition: Unit:						
3	Definition: Unit:						

Complete a separate form for each targeted SO, IR, and sub-IR.

Performance Monitoring Plan for Training
Part 2: Baseline, Expected Results, and Actual Results for Each Targeted SO/IR

Performance Indicator	Indicator Definition and Unit of Measurement	Baseline Data		Expected and Actual Results					
				1999		2000		2001	
		Year	Value	Expected	Actual	Expected	Actual	Expected	Actual
Targeted SO									
1	Definition: Unit:								
2	Definition: Unit:								
3	Definition: Unit:								
IR									
1	Definition: Unit:								
2	Definition: Unit:								
3	Definition: Unit:								

Complete a separate form for each Performance Indicator.

Performance Monitoring Plan for Training
Part 3: Summary of Final Training Event Reports

Performance Monitoring Plan for Training
Part 4: Summary of Major Conclusions from Follow-up Interviews

Performance Monitoring Plan for Training
Part 5: Summary of Success Stories

Performance Monitoring Plan for Training
Part 6: Summary of Complementary Evaluations

Performance Monitoring Plan for Training
Part 7: Targeted SO Narrative

Performance Monitoring Plan for Training
Part 8: SO 4.2 Narrative

Link Eight—Training Management
(M&E Phase)

Were good training management practices followed?

⌘ During the M&E stage of the TRC, USAID/W, through a separate mechanism, monitors training contractors and TA providers responsible for overall **Training Management** to determine if the contractors are following USAID rules and regulations. The monitoring also reviews how effectively the training is contributing to the targeted SO/IRs.

⌘ The monitoring of training management contractors involves the following four components:

- monitoring training contractors and TA providers in the U.S.;
- monitoring visits to training sites in the U.S.;
- monitoring visits to field offices of training contractors and TA providers; and
- monitoring in-country and third-country training.

⌘ Results of the monitoring are provided to USAID/W, the Mission, and the relevant contractor.

During the Planning Phase, you identified what training managers / organizers need to do to ensure a high-quality training event.

Link Seven—Training Event
(M&E Phase)

How well was the training event carried out?

⌘ The M&E Phase of Link Seven focuses on the work of the training contractors and TA providers who implement the **Training Event**. The effectiveness of individual training events is monitored by training contractors and TA providers through the implementation of a Training Monitoring Plan**,** which includes the following:

- telephone interviews;
- site visits; and
- exit questionnaires.

⌘ Training contractors and TA providers collect and analyze data and provide the results to Mission staff in a final training evaluation report for each event.

- **Telephone interviews**. During the training event, the training contractors contact trainees via telephone to assess not only the extent to which the training is meeting trainee expectations but also to gather information on the logistical aspects of the course.

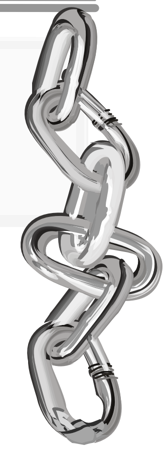
- **Site visits.** In some instances, training contractors gather information on the training event by visiting the training site to observe the training sessions and to ensure that the location is conducive to learning.

- **Exit questionnaire.** Each trainee completes a questionnaire before leaving the training site. The questionnaire asks trainees about their immediate reactions to training content and the management aspects of the course. The logistical/management information gathered from the exit questionnaire is used by the training contractor and TA provider to assess whether good training management practices were followed.

During the Planning Phase, you identified what the training event needs to have/do for trainees to learn effectively.

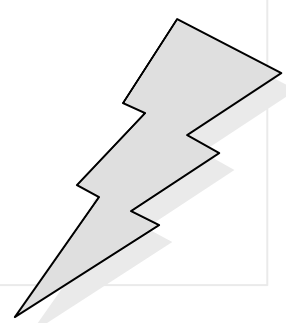
Link Six—Trainee Learning

(M&E Phase)



Do trainees think they achieved the KSAs outlined in the event objectives?

- **Trainee Learning** is measured by training contractors and TA providers who administer a self-assessment exit questionnaire to assess the immediate results of the training event on trainee knowledge, skills, and attitudes.
- The questionnaire results are also included in the Final Training Event Report and distributed to the sponsoring Missions and the E&E Bureau.
- The extended SO team summarizes the information for inclusion in the Performance Monitoring Plan for Training (PMP-T).



During the Planning Phase, you identified what trainees need to learn or be able to do.

Performance Monitoring Plan for Training
Part 3: Summary of Final Training Event Reports

Summarize the results of all final training event reports that relate to training events designed to support the achievement of the targeted SO.

The summary will become a reference for the design of additional training events and the R4 process.

1. What major conclusions can be drawn about the implementation of the training events? Were trainees satisfied with the management of the training events?

2. Based on the exit questionnaires, did trainees think they had achieved the objectives of the training events?

3. Were trainees satisfied with the design of the training events and the methodology used during training sessions?

Link Five—Training Application
(M&E Phase)

What new KSAs have trainees transferred to the workplace?

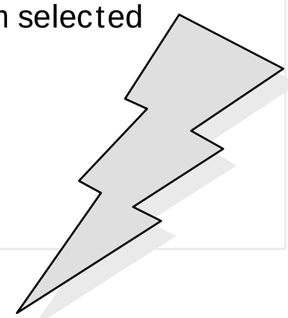
- Training contractors and TA providers monitor the **Application** of knowledge, skills, and attitudes in the workplace over time through follow-up interviews with selected trainees and colleagues.

- Results of the follow-up interviews are provided to the Mission staff and E&E Bureau.

- Follow-up interviews are designed in accordance with guidelines provided in the E&E Interview Protocol, which covers the following four topic areas:
  - general personnel information;
  - current status;
  - achievement of training objectives and application of training; and
  - retrospective assessment of the training program.

- The protocol for the follow-up interview is outlined in detail in the E&E Interview Protocols and Guidelines Manual, October 1998. A sample questionnaire is included in the appendix of that reference.

- M&E training information is submitted to **TraiNet,** a database developed by the USAID Global Bureau to report statistics required by the Office of Human Capacity Development. Information for TraiNet is compiled from selected questions of the exit questionnaire and from follow-up interview data.



During the Planning Phase, you defined what new knowledge, skills, and attitudes key personnel need.

Performance Monitoring Plan for Training
Part 4: Summary of Major Conclusions from Follow-up Interviews

Review stakeholder agreements and action plans to clarify the KSAs, training objectives, and expectations for trainees.

1. What was expected of trainees when they returned from the training event?

2. When trainees returned to the job, what were individual trainees responsible for in terms of improved work output or product quality?

3. What changes were needed in the work environment to enable trainees' work performance to change?

4. Identify results.

   A. What new KSAs have the trainees transferred to the workplace?

   B. What changes have been made in the work environment to support the implementation of the new KSAs?

Link Four—Work Groups

(M&E Phase)

What is the impact of training on the work group?

- The Monitoring and Evaluation aspects of Link Four focus on the impact of training events on the **Work Group.** Success stories can be used as one way to capture training results.

- Success stories are compiled by the extended SO team, which interviews returned trainees, supervisors, and clients to identify the changes that have occurred in the work group as a result of the training. Stakeholder agreements and action plans provide background information on what was expected of the trainee and the work group. (Review the E&E Interview Protocols and Guidelines Manual for more information on how to capture success stories.)

- Success stories are an important component of the overall monitoring and reporting framework for USAID. They can be collected relatively quickly and easily and can bring the human element to the attention of policy makers. Success stories, in addition to statistics, are an important factor in promoting an understanding of the process of development.

- Success stories are recorded in the Success Story Database on the web at http://www.enitraining.net to illustrate the results of training on the work group.

- Success stories can also be summarized in the Performance Monitoring Plan for Training (PMP-T) for possible use in the R4.

During the Planning Phase, you identified the key parts of the organization that need to function differently.

Link Three—Partner Organizations
(M&E Phase)

Did organizational performance improve? Did training play a role?

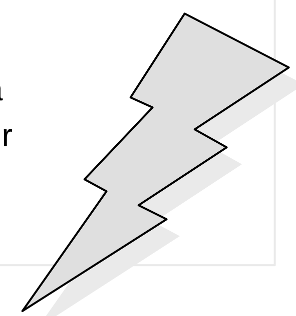
- As part of the monitoring and evaluation component of Link Three, the extended SO team assesses whether the targeted **Partner Organization's** performance has improved and, if so, what role training may have played. Information may be gathered through success stories and/or complementary evaluations.

- Success stories, explained in the previous section (Link Four—Work Groups), would be implemented in the same way in an organization.

- Under reengineering, USAID conducts complementary evaluations if there is a well-defined management need for them. The evaluations may be planned during the Mission's internal performance review.

- There are several reasons why a complementary evaluation would be conducted, for example,
  - if the outcomes have exceeded expectations and contain examples of replicable best practices or lessons learned; or
  - if certain targets are not being achieved and the reasons for not meeting the expectations are not clear.

- If a complementary evaluation has been undertaken during the last fiscal year and contains a section on the results of training, a summary would be included in the Performance Monitoring Plan for Training for possible use in the R4 process.



During the Planning Phase, you identified which partner organization(s) contributes to achieving the IRs.

Performance Monitoring Plan for Training
Part 5: Summary of Success Stories

Summarize the results of the Success Stories related to the training events that were implemented for the targeted partner organizations and work groups.

1. How many Success Stories were collected that relate to this training event?

2. Summarize the most important aspects of the Success Stories related to the training event. Pay particular attention to the relationship between the objectives and results of the training in terms of trainees and the partner organization / work group. Relate the results mentioned in the Success Stories to the targeted SO, IR, and performance indicators.

Performance Monitoring Plan for Training
Part 6: Summary of Complementary Evaluations

If complementary evaluations related to training for the targeted partner organization / work group were conducted during the year, summarize the major conclusions and recommendations.

If no relevant complementary evaluations were conducted, please go to the next Link of the TRC.

1. What were the results of the evaluation that related to training events?

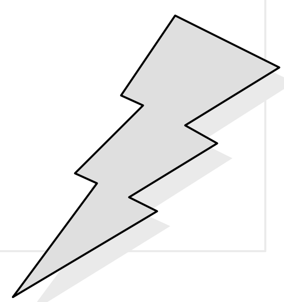
Link Two—Intermediate Results
(M&E Phase)

Was the IR achieved?
What lessons were learned?

⌘ During the monitoring and evaluation phase of Link Two, the extended SO team participates in the annual R4 preparation process to identify if and how training events contributed to the accomplishment of the Mission's strategic objectives, intermediate results, performance indicators, baselines, and targets.

⌘ The extended SO team prepares narratives that provide a concise summary of the results of training for each targeted SO, IR, and sub-IR. The narratives are integrated into the more comprehensive SO narratives of the R4.

⌘ In addition, the extended SO team and training contractors prepare a longer narrative (three to four pages) that summarizes the impact of training on the overall Mission program. This information becomes the narrative for E&E SO 4.2 (cross-cutting programs).



During the Planning Phase, you identified the critical results necessary to achieve the strategic objective.

Performance Monitoring Plan for Training
Part 7: Targeted SO Narrative

Prepare a brief narrative (one to four paragraphs) for each targeted SO, IR, and sub-IR you identified in Parts 1 and 2 of the PMP-T.

Paragraphs should provide a concise summary of the results of training for each SO either directly through the SO-level indicators or indirectly through the IR- or sub-IR-level indicators.

Brief Narrative

Performance Monitoring Plan for Training
Part 8: SO 4.2 Narrative

Prepare a longer narrative (three to four pages) summarizing the results of training on the overall Mission program.

1. Narrative for SO 4.2 (Participant Training)

2. Refer to Part 5 of the PMP-T. Summarize the most important aspects of the Success Stories related to the training event. Pay particular attention to the relationship between the objectives of the training and the results of the training on both the trainees and the partner organization / work group. Relate the results mentioned in the Success Stories to the targeted SO, IR, and performance indicators.

Link One—Strategic Objective
(M&E Phase)

What needs to be done next to achieve or sustain the SO?

⌘ **Strategic Objectives** do not change on an annual basis. Most Missions develop a four- to eight- year plan to achieve each Strategic Objective.

⌘ The Training-for-Results Chain planning and evaluation process is an annual cycle that is repeated throughout the life of strategic objectives that contain training components in the results packages.

⌘ Lessons learned from the design, implementation and monitoring of training events during the previous year are applied to the following year until all Intermediate Results are achieved and the targeted Strategic Objective is met.

⌘ The same procedure is applied to all Strategic Objectives in each Mission's portfolio.

During the Planning Phase, you identified the targeted SO—the ultimate result the Mission wants to achieve.

Glossary

- ⌘ Academy for Educational Development (AED)—One of the U.S. contractors selected to administer the standalone training project for the New Independent States. AED also provides in-country assistance to other contractors in processing participants for U.S.-based training. Processing services are available on a fee-for-service basis.

- ⌘ Academic Training—A program of study in an accredited institution of higher education that is intended to result in an academic degree (e.g., Associate of Arts/Sciences, Bachelor of Arts/Sciences).

- ⌘ Activity/Intervention—An action undertaken to help achieve a result. Examples include training, technical assistance, policy dialogue, grants, and loans.

- ⌘ ADS 253—ADS is the acronym for USAID's policy documents (Automated Directives System). ADS 253 is the document that covers training policies and procedures. All USAID ADS documents are available through the Internet on USAID's website. ADS 253 is available on the Training Assistance for Europe and the New Independent States website.

- ⌘ Agency Goal—A long- term development result in a specific area that USAID has identified as a distinct goal. USAID programs are designed to contribute to achieving the Agency's goals.

- ⌘ Center for Human Capacity Development (HCD)—The U.S.-based USAID office within the Global Bureau that provides general direction for USAID-sponsored and financed international training activities.

- ⌘ Country Strategy—Each country in CEE and the NIS has a development strategy that provides the strategic objectives for development assistance. In addition, the country strategy includes descriptions of the interventions to be supported and the expected impact of the interventions.

- ⌘ Evaluation—The process of determining whether objectives are met in the short and long terms. The evaluation may be of the processes used to implement a program as well as of the program itself. Ultimately, USAID's activities are intended to result in positive change as determined through impact evaluations. In the case of training, for example, it is possible for both the process and the program to meet stated objectives and result in no impact. This outcome occurs when the training program fails to support technical assistance activities or when there are insufficient numbers of people trained in a particular area to constitute a critical mass. USAID conducts process evaluations, program evaluations, and impact evaluations.

- ⌘ IAP66A Form (Information Agency Program 66A)—This U.S. Information Agency form is completed by a USAID sponsoring unit or its contractor. It identifies a participant's study program and certifies USAID's financial sponsorship of the participant. The signed IAP66A form must be presented to the U.S. Consular Official as part of the participant's J-I visa request.

- ⌘ Individual Results (training agreement)—A document in which each trainee outlines detailed specific objectives relating to his/her training program. Objectives are linked to those of the overall results package. The training agreement is developed among all stakeholders in the training process, including the employer, the programming agent, and the training institution (refer to Stakeholder Agreement.)

⌘ **Intermediate Result (IR)**—A key result that must occur to achieve a strategic objective. Linkages between intermediate results and strategic objectives are causal; the IR must support the achievement of the SO. The IR must be measurable and quantifiably verifiable.

⌘ **International Science and Technology Institute (ISTI)**—The lead contractor on the monitoring and evaluation component of the TRANSIT project.

⌘ **Mission Performance Plan (MPP)**—A comprehensive and authoritative document prepared by country teams representing all U.S. Government agencies and approved by chiefs of Mission (usually the ambassador) at over 160 embassies and Missions around the world. The MPP helps set priorities, requests resources, and ensures consistency among agencies in-country and with Washington headquarters.

⌘ **Mission Training Plan**—A Mission training plan should be prepared for each country/Mission in CEE and the NIS. The plan includes descriptions of the types of programs that are planned for the current (and, when appropriate, future) fiscal year along with a clear articulation of the programs' training objectives. Because training supports so many strategic objectives, the training activities are interspersed throughout the results framework. To implement training activities, however, it is necessary to develop more detailed training planning documents that become the basis for estimating resources required to administer training activities. The Training Event Online (TEOL) tool is used to design training events and Mission training plans.

⌘ **Monitoring/Reporting**—Regular tracking and updating of the status of a project or trainee (in the case of training) from time of arrival in the U.S. to the day of departure. In the case of a trainee, status refers to academic progress, visa status, adjustment to new culture, living situation, financial matters, general health, etc.

⌘ **Observation Tours / Observational Training**—Scheduled visits to facilities in several locations to learn a process, method, or system through observation and discussion. Observation tours should emphasize the acquisition of development ideas, attitudes, and values. This training modality is suited to mid- to high-level officials/professionals who can benefit from updating or exposure to new ideas and technologies. Teams from a single country or multicountry teams with homogeneous interests/background can often benefit from this type of training. The language of the participants should either be English or the same foreign language to minimize confusion.

⌘ **On-the-Job Training (OJT)**—OJT refers to training whereby the trainee works at a particular job or assignment in order to acquire skills. OJT is generally the same as internship training but may be offered without an academic component. OJT is an acceptable type of USAID funded training as long as no wages are involved. OJT is often difficult to arrange due to potential problems with workers' compensation and business liability insurance. Candidates for OTJ programs must speak excellent English, as business establishments are generally not equipped to work with interpreters. In addition, if a business could be identified that would accept a trainee or two with an interpreter, the unit cost of such training would be prohibitive. USAID-funded OJT programs have traditionally been of very short duration—one month or less.

⌘ **Orientation, Pre-departure**—Activities designed to provide trainees with current and specific information on what is to be accomplished in their training. Pre-departure orientation may include an overview of the social/cultural behavior of the peoples of the U.S. to help reduce culture shock; information regarding basic airport routines for international travel; personal finance information; and what to expect at the training site. The orientation often helps establish how a trainee will respond/ adjust to a U.S. training / living experience. An orientation program conducted before departure should require a minimum of four hours, although a thorough program can take several days.

⌘ Package Programs—Programs of training instruction in which the payment made to the training provider includes the instructional cost, supplies/equipment, and lodging. Some package programs also include food. Generally, if a program is advertised to include food and lodging, the trainee is not allowed to obtain lodging or food separate from the program. If alternative arrangements must be made, it is usually not possible to negotiate a price adjustment.

⌘ Participant Training Project for Europe (PTPE)—The original standalone training project that sponsored the technical assistance activities taking place in Central and Eastern Europe. PTPE included funding to provide training processing services to other contractors in the region. It supported strategic objectives and was implemented by the Partners for International Education and Training (PIET), now World Learning, Inc. In May 1997, PTPE was replaced by TRANSIT-Europe.

⌘ Partner—An organization or customer representative with whom AID works cooperatively to achieve mutually agreed upon objectives and intermediate results and to secure customer participation. Partners include private voluntary organizations, indigenous and other international non-governmental organizations, universities, other U.S. government agencies, UN and other multilateral organizations, professional and business associations, and private businesses.

⌘ Performance Indicator (PI)—A particular characteristic or dimension used to measure intended changes defined by an organizational unit's results framework. PIs are used to observe progress and to measure actual compared with expected results. PIs answer "how" or "whether" a unit is progressing toward its objective rather than why/why not progress is being made.

⌘ Performance Monitoring Plan (PMP)—A detailed plan to manage the collection of data in order to monitor performance. The plan identifies the indicators to be tracked; specifies the sources, method of collection, and schedule of collection for each datum required; and assigns responsibility for collection to a specific office, team, or individual.

⌘ Performance Monitoring Plan for Training (PMP-T)—A detailed plan for collecting and tracking training results information that will provide data to help evaluate the success of training in supporting selected SO/IRs. The information informs the R4 process and the decision-making process for future training plans.

⌘ Prime Contractor—The prime contractor performs participant training, field support, and U.S. placement functions for E&E.

- NIS—AED is the prime contractor for TRANSIT-NIS and administers all English language tests for USAID-funded trainees coming from the NIS whether or not they fall under TRANSIT. AED is charged with responsibility for reviewing all documents relating to the training process completed by other contractors before submission to USAID for action. AED also provides in-country processing services to other contractors in the NIS on a fee-for-service basis and completes required U.S. paperwork for a fee. Contractors and grantees are not required to use the services of AED if they are equipped to carry out processing themselves (this applies to U.S. processing and paperwork as well). Any arrangements made for process services are completed by individual contractors or grantees.
- CEE—World Learning is the prime contractor for TRANSIT-Europe. The World Learning contract includes funding for the in-country processing of other contractors' trainees. In the case of TRANSIT- Europe, trainee processing must be completed by World Learning, which serves as the Mission training office. Processing activities include medical form review, visa applications, language testing, pre-departure orientation, and ensuring that the Conditions of Training form is signed.

⌘ Request-for-Training Form (see Training Event Request Form).

⌘ Results Framework—An articulation of the cumulative impact of all training and related activities supporting a given strategic objective. The cumulative measure of success is achievement of the strategic objective. Intermediate indicators of progress toward final results are included. The framework is established as part of the strategic planning process.

⌘ Results Review and Resource Request (R4)—A document that reviews the previous year's results and requests resources for the coming year.

⌘ Short-Term Training (also known as technical training)—Training, regardless of location, that is not designed to lead to the awarding of an academic degree. Short-term training usually lasts between one week and nine months.

⌘ SO Team—The Mission group that is committed to achieving a specific strategic objective and whose members hold themselves individually and collectively accountable. The team can include USAID staff only or USAID staff, partners, stakeholders, and customer representatives.

⌘ Stakeholder—Individuals and/or groups with an interest in USAID training activities, programs, or objectives. Examples are trainees, their supervisors or work unit managers, training contractors, training providers, partner organizations, and representatives from USAID sponsoring units.

⌘ Stakeholder Compact/Agreement—A written statement among the trainee and other stakeholders specifying agreed-to performance change targets within the organizational setting of the trainee. Agreements usually include

- definition of expected training outcomes in terms of performance;
- agreed-to date that the trainee will appear for work to implement training gains and other specific conditions of training;
- a plan for attaining agreed-to performance objectives through training and follow-on, including stakeholder responsibilities; and
- proposed means to measure training impact.

⌘ Strategic Assistance Area (SAA)—The E&E Bureau has identified four SAAs that are important for the transition of E&E countries to market-oriented, democratic societies. The SAAs provide a common point of reference for E&E Missions and make explicit the bureau's strategic priorities as follows:

- SAA 1: Economic Restructuring
- SAA 2: Democratic Transition
- SAA 3: Social Sector Reform
- SAA 4: Special Initiatives and Cross-Cutting Programs

⌘ Strategic Objective (SO)—A finite set of development achievements established by USAID Missions. The strategic objective is the expected outcome resulting from a series of interventions sponsored by USAID and/or other donor countries/organizations. The strategic objective can be broad or narrow depending on the level of resources that can be devoted to its achievement. A strategic objective should be a significant development result that is clear, precise, and objectively measurable. It is the highest-level result that the Missions or bureau can materially affect through their work and for which a mission or bureau is willing to be held accountable. SOs must be

- unidimensional;
- linked to the agency's objectives and goals; and
- achievable within five to eight years.

⌘ Strategic Plan (SP)—A framework that articulates priorities, helps manage for desired results, and links results to the client or customer.

⌘ Sub-Intermediate Results (sub-IR)—An outcome that must occur in order to achieve an IR.

⌘ Technical Assistance (TA) and Technical Assistance Providers (TAP)—Contractors, Cooperative Agreement holders, and grantees whose primary function is to implement sector projects for the E&E. Projects may focus on health, private sector development, environment, housing, etc. Technical assistance contracts may include training components both in-country and in the U.S.

- **Technical Training**—All training not classified as academic training. Technical training may take the form of observational visits, OJT, special seminars or programs, workshops, and nondegree training in academic institutions (see also short-term training).

- **Technical Training for Societies in Transition (TRANSIT)**—The E&E Bureau's standalone training activities under the Global Training in Central and Eastern Europe and New Independent States.

- **Third-Country Training**—Training that takes place outside the trainee's home or country-of-residence, but not in the United States. Third-country training is growing in importance as the capacities of indigenous organizations to conduct training is improving. It is appropriate to include some third-country training as part of a U.S. program when the objective is to provide the trainee with the opportunity to see alternative delivery methods/systems. To the extent possible, third-country training should be limited to other USAID recipient countries. Waivers for training in other developed countries must be approved by the Mission director and include proper justification for not using either U.S. or developing-country institutions as training providers.

- **Trainee**—A term used to refer to any academic or technical student/participant who is funded/sponsored by USAID.

- **Trainee Action Plans**—Forms that clarify
  - expectations of trainees and training providers;
  - how trainees will use their new skills on the job;
  - how trainees will share expertise when they return to work;
  - how technical advisers will support trainees in implementing new skills on the job; and
  - how organizations and work group managers and supervisors will support trainees' efforts to apply new knowledge and skills.

- **TraiNet**—USAID's global database system enabling the planning and reporting of information on all USAID training activities, including in-country training. Data collected by USAID and/or its partners via TraiNet include
  - measures of results/performance monitoring;
  - training program/trainee identification; and
  - costs and cost sharing.

  The TraiNet software is a self-contained, distributable application that helps Missions and contractors collaborate on training for results. TraiNet will replace former databases such as PTIS and PTMS.

- **Training** — A planned intervention to solve identified performance gaps through the acquisition and application of new knowledge, skills, or attitudes (KSAs). New KSAs intended to meet planned training objectives are acquired via either structured learning and follow-up activities or less structured workshops. Training can consist of long-term academic degree programs, nonacademic seminars, workshops, on-the-job learning experiences, or observational study tours. Training can be a component of a technical assistance project or a standalone project. Training can be built around a single training event or a series of multiple training events that work toward the same performance objective over time.

- **Training Event**— A specific training activity in which the KSAs all relate to the same learning objective. A training event can be a one-time course/workshop or a series of multiple interventions over time that relate to the same learning objective.

- **Training Event Request Form**—A Web-based interactive form used to create, propose, implement, and report on training events in the E&E region. The form is housed in the TEOL website.

- ⌘ Training Events On-Line (TEOL)—Web-based system for the development and warehousing of training plans.

- ⌘ Training Impact—Improvement in individual job or organizational performance attributable to new KSAs acquired during a training, applied in work settings, and designed to contribute to institutional, sectoral, and host-country development activities.

- ⌘ Training, Formal—A learning activity taking place in a classroom or workshop with formally designated instructor(s), learning objectives, and outcomes and conducted full-time or intermittently within the host-country.

- ⌘ Training, Informal—Learning activities that take place outside the classroom or other such formal structure during a period of agency-sponsored training. Informal training includes study and observational tours and on-the-job practical learning activities not connected to formal classroom instruction.

- ⌘ Training Needs Assessment—Identification of country-, sector-, or project-level human resource development needs. Training needs assessments use country demographic information, government- specific information, and special surveys. The needs assessment does not have to be conducted by USAID as long as a current, reputable information source is available from which information can be gathered. A training needs assessment should be completed and consulted before developing any training project.

- ⌘ Training Plan—A compilation of all Mission-supported training that directly links training with strategic objectives, provides a Mission-wide view of Mission-supported human capacity development efforts, and includes a related Mission-wide training cost containment plan or strategy. A training plan often forms the basis of the scope-of-work for training programmer contracts. Development of all training plans is currently transitioning to the TEOL electronic system. Preparing a training plan does not generate a training strategic objective but rather is the compilation of training events that relates training activities across various strategic objectives or programs.

- ⌘ Training Program—One or more training events in support of a specific strategic objective.

- ⌘ Training Provider—Any institution, organization, or individual furnishing instruction directly to a trainee under full or partial USAID funding. The provider can be public, private, nonprofit, or for-profit. Providers are distinct from contractors, which arrange for such training and are known as "programming agents."

- ⌘ Training-for-Results Chain (TRC)—A tool that helps Missions plan and evaluate training activities that support the achievement of the Mission's strategic objectives and intermediate results.

- ⌘ Training Resources Group, Inc. (TRG)—A private, employee-owned consulting firm based in Alexandria, Virginia, that provides training and organizational development consulting services to USAID, E&E, and TRANSIT. Developers of the TRC workbook.

- ⌘ U.S. Agency for International Development (USAID)—The U.S. government agency responsible for administering development assistance around the world.

- ⌘ World Learning, Inc.—One of the U.S. contractors selected to administer the standalone training project for Central and Eastern Europe. World Learning carries out in-country processing for all training activities, not just those funded through TRANSIT.

ANNEXES

Comparison of Traditional Training and Reengineered Training*

The following chart highlights the differences in USAID's approach to training before and after reengineering.

USAID's reengineered training approach focuses on achieving results through improvement of performance of individuals and partner organizations.

	TRADITIONAL TRAINING	REENGINEERED TRAINING
Needs Assessment	Provided a general inventory of training needs.	Assesses performance gaps affecting achievement of objectives.
Objectives	Training was the objective. Objectives were not linked to program goals; they were defined as learning results and were aimed at general improvement.	Training is one of several tools or interventions used to achieve a strategic objective. Training objectives show direct linkage to an SO or IRs. Objectives target specific knowledge, skills, and attitudes (KSAs) and identify measurable results.
Selection	Trainees were selected in accordance with individual merit, ability, or leadership qualities.	Trainees identified for training are those who will perform the jobs that will contribute to organizational improvement. A *critical mass* of people is selected for maximum impact.
Design/ Implementation	Historic preference called for U.S.-based training. Training designs were based on the number of people trained or trainees' needs.	Types of training, location, and duration match real needs. Design is targeted and based on the need to upgrade performance of the institution.

* Adapted from Otero, Cecilia. *Training as a Development Tool*, prepared for USAID by the Academy for Educational Development, Research and References Services Project, September 1997.

	TRADITIONAL TRAINING	REENGINEERED TRAINING
Evaluation	Number of people trained was the indicator. Measured in terms of outputs, such as number of people trained, or inputs, such as number of courses offered. Quality of training was assessed in accordance with participant satisfaction and individual results achieved. Accountability rested with trainers only.	SO teams identify specific measurable training objectives before training and agree on expected changes that training will bring. Results are assessed in relation to training objectives. Changes in specific performance related to training objectives are evaluated. Baseline data and targets are required. Data are used to measure improvement and results. Trainees, supervisors, and trainers are accountable for achieving training objectives and results.
Role of Training Specialists	Training was the sole responsibility of the Training Office. Training specialists managed the training function and provided a specialized service.	Training specialists are integrated into SO teams and together participate in the planning, implementation, and monitoring of training. They become strategic partners and assess needs, monitor progress, and report results.
Role of the Customer	Partner organizations had little input into the planning of training activities. The benefit of training to partner organizations was not always specified. Participant alone was responsible for applying new skills.	Customers (trainees and supervisors) provide input and are directly involved in the identification, planning, and implementation phases of all training events. Partner organizations help identify needed changes and are aware of benefits derived from training their staff. Application of new skills is the responsibility of the supervisor in addition to the trainee.

Sample Telephone Interview

The telephone interviews are conducted by the Training Contractor staff with selected trainees. The following topics are discussed:

- ⌘ Lodging
- ⌘ Transportation
- ⌘ Per diem questions
- ⌘ Training Program—meeting expectations and objectives
- ⌘ Instructors
- ⌘ Ability to participate
- ⌘ Applicability to work
- ⌘ Action Planning activities
- ⌘ Access to reference materials
- ⌘ Reaction to overall program
- ⌘ HAC problems
- ⌘ Other issues/questions/concerns/problems

Sample Exit Questionnaire

⌘ Training Contractors use Exit Questionnaires to evaluate the results of the training and the effectiveness of the Training Provider. The questionnaires request trainees to provide information in the following topic areas:

- trainee data;
- orientation;
- logistics;
- language;
- program content; and
- program assessment.

⌘ The results of the questionnaires are tabulated and compiled into a Final Training Event Report that is provided to the Missions and E&E/W.

TraiNet Questions

TraiNet questions associated with the trainee Exit Questionnaire follow:

Please assess the following statements by circling the most appropriate answer on the scale provided.

1 (Strongly disagree)	2 (Disagree)	3 (Agree)	4 (Strongly agree)

1. The training program was very useful for me.

   1 (Strongly disagree) 2 (Disagree) 3 (Agree) 4 (Strongly agree)

2. The training program was directly relevant to my work.

   1 (Strongly disagree) 2 (Disagree) 3 (Agree) 4 (Strongly agree)

3. I will be able to apply what I learned in my work.

   1 (Strongly disagree) 2 (Disagree) 3 (Agree) 4 (Strongly agree)

4. To what extent were the objectives of the training program met (as described in the Shareholder Agreement)?

   A— Not at all B— Only to a slight extent

   C—To a medium extent D—To a great extent

5. Overall, how would you assess your training experience?

   A—Excellent B—Good C— Fair

   D—Poor E —Very Poor

6. Have you made arrangements to maintain your personal or professional relationships with any of your professional counterparts, hosts, or training providers?

   Yes No

TraiNet questions associated with the Participant Follow-on Questionnaire / Evaluation of USAID Training Programs follow:

1. How has your job status changed since you completed the USAID-sponsored training program? (Circle all that apply)
   - A — Was promoted
   - B — Received increased responsibilities
   - C — Received a salary increase
   - D — No change
   - E — Other

2. To what extent did the training program achieve all of the training objectives?

   1—Not at all 2—Partially 3—Almost completely 4— Completely

3. To what extent have you been able to accomplish the job-related objectives stated in the Training Plan?

   1—Not at all 2—Partially 3—Almost completely 4—Completely

4. Following the training, has your job performance contributed to the intended changes in your organization?

   1—Not at all 2—Partially 3 —Almost completely 4—Completely

5. What were the constraints to organizational change? Rank in order of importance from 1 (least important) through 6 (most important).
   - ____Lack of resources (financial, staff, equipment, etc.)
   - ____Training not applicable to work situation
   - ____Unstable political/economic climate
   - ____Lack of relevant/suitable legislation or reform
   - ____Lack of support from local authorities
   - ____Lack of support from supervisor and/or upper management

6. Have you trained other people or shared your training with coworkers (e.g., discussions, meetings, seminars, etc.)?

   1— No 2— Yes (How many?____)

7. Have you or your organization maintained professional or commercial relations with any people or organizations that you made contact with in the training?

   1— No 2— Yes

8. Now that you have returned to work in your home country and have had the opportunity to apply new skills and knowledge in your work, how satisfied are your with your training program?

   1 — Very satisfied
   2 — Dissatisfied
   3 — Undecided
   4 — Satisfied
   5 — Very satisfied

Resources

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Training-Related Internet Sites

- ⌘ **www.astd.org—**Site of the American Society for Training and Development, one of the leading sources in the field of training and human resource development. Provides research, analysis, and practical information. See *Site Index* for links to a wealth of resources.

- ⌘ **www.shrm.org—** Site of the Society for Human Resource Management; provides resources similar to those of ASTD.

- ⌘ **www.tcm.com/trdev—**Provides links to a vast array of noncommercial sites, three online bookstores, and commercial suppliers. Links to Trdev-L, an excellent listserv (Internet discussion group) created and managed by Pennsylvania State University.

- ⌘ **www.trainingsupersite.com—**An integrated site that provides training resources, including links to numerous publishers and the *Training Magazine*.

- ⌘ **www.universityassociates.com—**University Associates provides consulting and training services and products. Click on *Books and Materials* for an excellent selection of resources.